Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

Closed Session (Special Meeting at 5:00 p.m.)

North Carolina General Statutes §143-318.11(a) 3

(3) To consult with an attorney employed or retained by the public body in order to preserve the attorney-client privilege between the attorney and the public body, which privilege is hereby acknowledged.

Call To Order (open session)

Roll Call

Agenda Approval

Town Manager's Report

Public Comment

Items of Consent

1. Minutes
2. FY 2022 Budget Amendment No. 1

Items for Discussion and Consideration

1. Town Manager Search Contract with Mercer Group Associates
2. County Water Rate Increase – Eastman Creek Subdivision
3. Beaufort Garden Club Public Art Project at Topsail Park "Menhaden Melody"
4. Middle Passage Marker Project
5. COVID Numbers in Carteret County and Return to In-Person Board Meetings Check-In

Public Hearing

1. Request to Rezone 100 Fairview Drive and 1310 Live Oak Street from B-1 to TCA; Case No. 21-18

Quasi-Judicial Hearing

1. Request for Special Use Permit – 1550 Lennoxville Road – Gas-Service Station (Jim Dandy Stores); Case No. 21-17

Mayor/Commissioner Comments

Adjourn

Public Participation FAQ

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Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Items of Consent

SUBJECT: Minutes

BRIEF SUMMARY:

In accordance with 160A-72 of the General Statutes, the Governing Board has the legal duty to approve all minutes that are entered into the official journal of the Board's proceedings.

The following draft minutes are recommended for approval:

April 26th– Virtual Board of Commissioners Work Session

May 10th – Virtual Board of Commissioners Regular Meeting

May 17th – Virtual Board of Commissioners Budget Work Session 1 of 3

May 20th – Virtual Board of Commissioners Budget Work Session 2 of 3

May 24th – Virtual Board of Commissioners Work Session

May 26th – Virtual Board of Commissioners Budget Work Session 3 of 3

REQUESTED ACTION:

The Town Clerk recommends the Board consider the draft minutes and approve as presented or amended.

EXPECTED LENGTH OF PRESENTATION:

2 minutes

SUBMITTED BY:

Allen Coleman, Town Clerk and Assistant to the Town Manager

BUDGET AMENDMENT REQUIRED:

No

DRAFT

MINUTES
TOWN OF BEAUFORT
BOARD OF COMMISSIONERS
VIRTUAL SPECIAL MEETING
MARCH 1, 2021
4:00 P.M.

Due to the State of North Carolina's Declaration of Emergency in response to the COVID-19 pandemic and per NCGS § 166A-19.24, the Town of Beaufort Board of Commissioners conducted a remote meeting using the Zoom application. Members of the Board of Commissioners participated in the meeting remotely.

The Town of Beaufort Board of Commissioners met remotely for a special meeting on Monday, March 1, 2021 at 4:00 p.m. with the following members present:

Mayor Everette Newton presiding
Mayor Pro Tempore Charles McDonald
Commissioner Ann Carter
Commissioner John Hagle
Commissioner Sharon Harker
Commissioner Marianna Hollinshed

Others Present: Town Manager John Day and Town Clerk and Assistant to the Town Manager Allen Coleman (All other staff members will be identified appropriately below)

Mayor Newton asked Allen Coleman to open the meeting to the public.

Mayor Newton called the meeting to order at 4:00 p.m., welcomed everyone in attendance, and asked Town Clerk Allen Coleman to call the roll.
Roll Call ensued.

[AGENDA APPROVAL]
A motion was made by Commissioner Hagle to approval the agenda as presented.
Mayor Newton call each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS

[ITEMS FOR DISCUSSION AND CONSIDERATION]

1. Discussion of the USDA Financing Package for the Utility and Storm Water, and Street Improvements CIP Project

The Board received a presentation from the Town Engineer concerning the following financing proposal from the USDA, Rural Development for the Utility Line, Storm Water, and Street Improvements Capital Improvement Project (CIP):

Wastewater Collection Rehabilitation - $7,036,000 loan / $5,005,000 grant
Water Distribution System Improvement - $8,031,000 loan/ $0 grant
Stormwater System Improvements - $3,007,000 loan / $500,000 grant

Manager Day said we have some really good news to share from the USDA Rural Development Division. He said the Town had been offered over five and half million dollars in grants and approaching 15 million dollars in low interest loans, and he and staff were extremely pleased. He said the total amount of the project was approaching 30 million dollars.

Manager Day said this news was a huge step forward in terms of correcting a number of the utility problems, and this funding would allow resurfacing of the streets in those affected areas.

Manager Day said there were financing options available, and the Board did not need to make a final decision today, however, it would be helpful if the Board could provide a general consensus on the options proposed. He said if the Board chose to move forward with the offer proposed by USDA, the turnaround time would be fairly quickly. He said other counties and municipalities had submitted applications for this funding and if the Board was not interested in the financing options, USDA would like to be able to notify and pass along to other entities.

Greg Meshaw, Town Engineer, presented the following PowerPoint presentation:

Slide #1

USDA Funding Considerations

Town of Beaufort

March 1, 2021

Slide #2

USDA Funding Applications (Water, Sewer & Stormwater)

Program

- Water & Waste Disposal Loan & Grant Program
  - Funds for the acquisition, construction or improvement of:
    - ⇒ Drinking water sourcing, treatment, storage & distribution
    - ⇒ Sewer collection, transmission, treatment & disposal
    - ⇒ Stormwater collection, transmission & disposal

Greg Meshaw said this project proposal was started by the Board's decision to resurface streets that did not have any known or obvious problems associates with the underground infrastructure. He said this project was a rather large tasks and cost significant dollars.

Slide #3

USDA Funding Applications (Water, Sewer & Stormwater)

Funding

- Water & Waste Disposal Loan & Grant Program
  - Long-term (40 years), low-interest loans
  - Grants possible to keep user charges reasonable
    - ⇒ Sewer: Up to 75% of total
    - ⇒ Water: Up to 10% of total
    - ⇒ Stormwater: Grants not typical

Slide #4

USDA Funding Applications (Water, Sewer & Stormwater)

Premise of funding application:

- Available for debt service
  - $350,000 per year for water & sewer
  - $120,000 per year for stormwater
- Loan terms
  - 1.75% interest rate
  - 38-year principal repayment over a 40-year period

Greg Meshaw said these rates are assumptions to project the debt service needed to cover these projects.

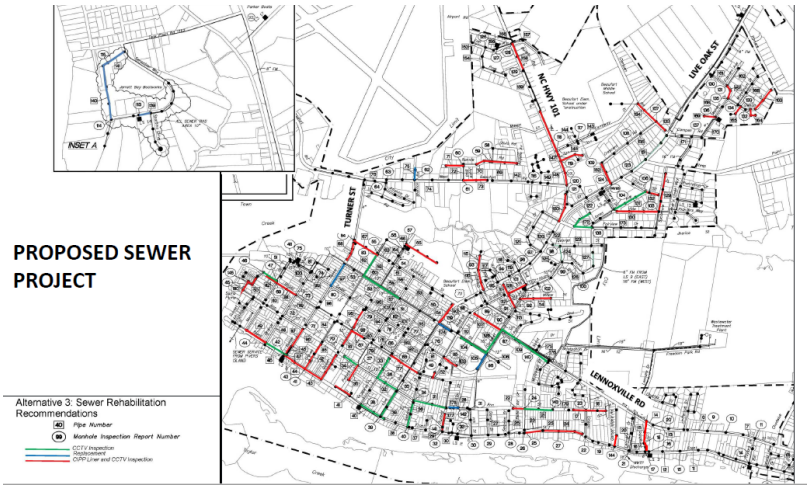
Slide #5

USDA Funding Applications (Water, Sewer & Stormwater)

Premise of funding application (continued):

- Maximum grants
  - Sewer grant @ 75%
  - Water grant @ 10%
  - Stormwater @ 0%

Slide #6



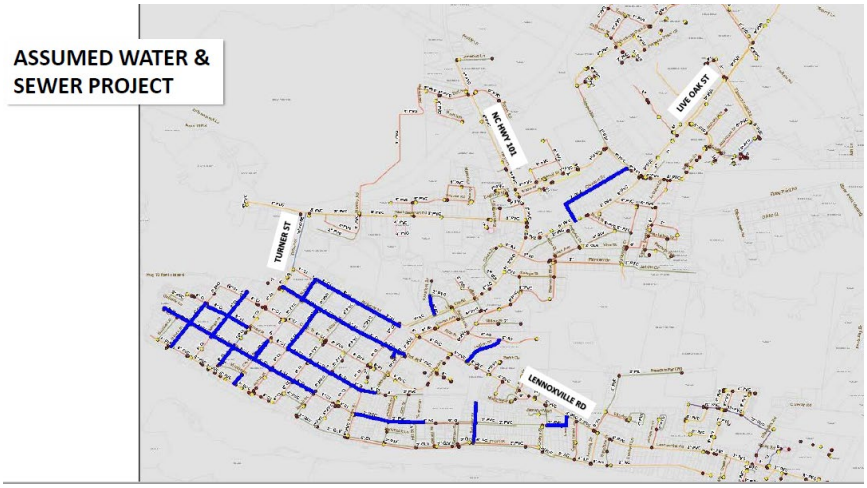
Slide #7

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Application Assumptions:

		Debt Service (1.75%, 40 Years)	
Sewer Grant Amount (75%)	$ 9,030,800		
Sewer Loan Amount (25%)	3,010,200	→ $109,100/Yr	
Sewer Subtotal	$12,041,000		→ $350,000/Yr
Water Grant Amount (10%)	$		
Water Loan Amount (90%)		→ $240,900/Yr	
Water Subtotal	$		

Slide #8



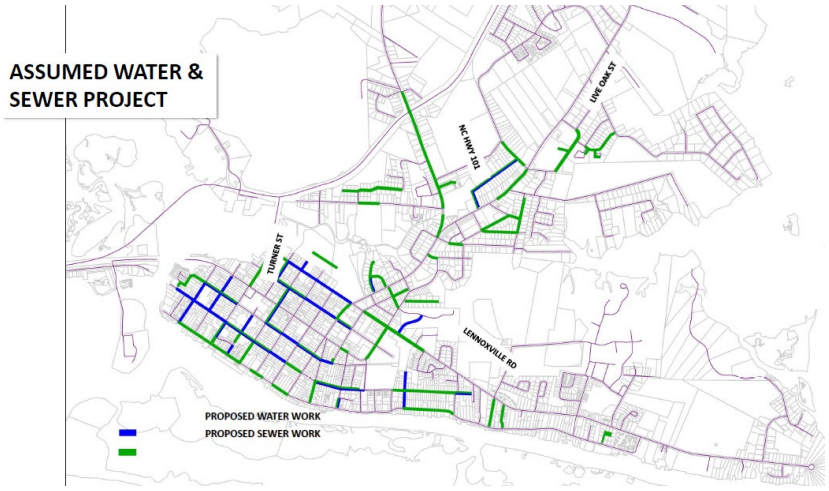
Slide #9

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Application Assumptions:

		Debt Service (1.75%, 40 Years)	
Sewer Grant Amount (75%)	$ 9,030,800		
Sewer Loan Amount (25%)	3,010,200	→ $109,100/Yr	
Sewer Subtotal	$12,041,000		$371,200/Yr
Water Grant Amount (10%)	$ 830,100		
Water Loan Amount (90%)	7,229,900	→ $262,100/Yr	
Water Subtotal	$ 8,031,000		

Slide #10



Slide #11

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Application vs Offer:

	Goal	*Actual Offer*
Sewer Grant Amount	$ 9,038,800	$ 5,005,000
Sewer Loan Amount	3,010,200	7,036,000
Sewer Subtotal	$12,041,000	$12,041,000
Water Grant Amount	$ 830,100	$ 0
Water Loan Amount	7,229,900	8,031,000
Water Subtotal	$ 8,031,000	$ 8,031,000

Slide #12

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Application vs Offer:

	Goal	*Actual Offer*
Stormwater Grant Amount	-	$ 500,000
Stormwater Loan Amount	3,431,000	3,007,000
Stormwater Subtotal	$ 3,431,000	$ 3,507,000
OVERALL FUNDING	$23,503,000	$23,579,000

Slide #13

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Offer:

- Largest North Carolina sewer grant in over 10 years
- $5,005,000 sewer grant = 38.5% of State fiscal year grant allocation
- $5,505,000 grant total = 42.3 %

Slide #14

USDA Funding Applications (Water, Sewer & Stormwater)

Premise of funding application:

- Available for debt service
  - $350,000 per year for water & sewer
  - $120,000 per year for stormwater
- Loan terms
  - ~~1.75%~~ interest rate **1.25%**
  - Repayment over 40 years ✓

Greg Meshaw said now assumptions have to be compared with the final offer from the USDA. He said the term did not change and remains at 40 years, however, the interest rates is significantly better than predicted.

Slide #15

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Offer:

		Debt Service (1.25%, 40 Years)	
Sewer Grant Amount	$ 5,005,000		
Sewer Loan Amount	7,036,000	→ $233,700/Yr	
Sewer Subtotal	$12,041,000		
Water Grant Amount	$ 0		→ $500,500/Yr
Water Loan Amount	8,031,000	→ $266,800/Yr	
Water Subtotal	$ 8,031,000		

Slide #16

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Offer:

		Debt Service (1.25%, 40 Years)
Stormwater Grant Amount	$ 500,000	
Stormwater Loan Amount	3,007,000	→ $99,900/Yr
Stormwater Subtotal	$12,041,000	
OVERALL FUNDING	$23,579,000	

Slide #17

USDA Funding Applications (Water, Sewer & Stormwater)

Premise of funding application:

- Available for debt service
  - $350,000 per year for water & sewer **vs $505,500/year (+$150,500/year)**
  - $120,000 per year for stormwater **vs $99,900/year (-$ 20,100/year)**
- Loan terms
  - ~~1.75%~~ interest rate **1.25%**
  - 40-year repayment ✓

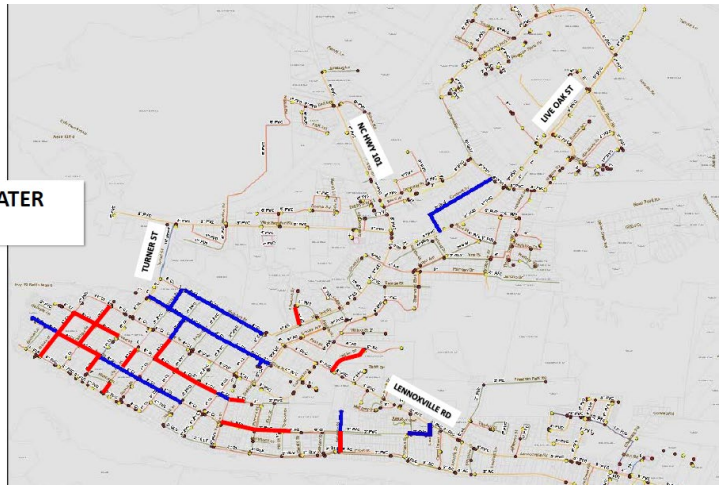
Slide #18

USDA Funding Applications (Water, Sewer & Stormwater)

Funding Offer:

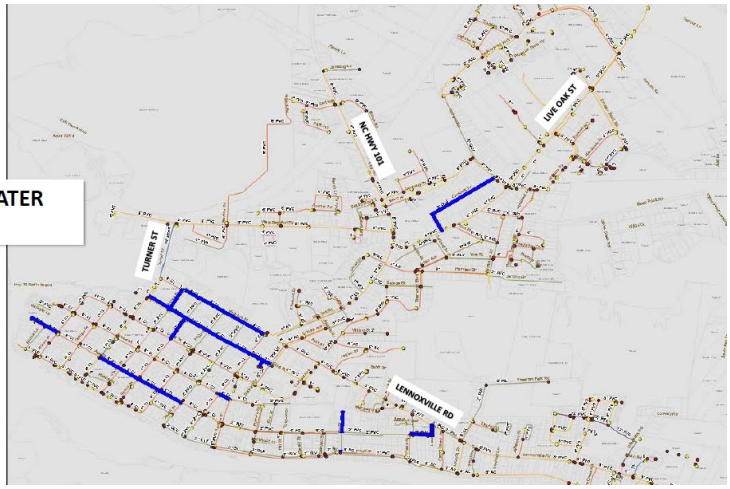
			Debt Service (1.25%, 40 Years)	
Sewer Grant Amount		$ 5,005,000		
Sewer Loan Amount		7,036,000	→ $233,700/Yr	$351,700/Yr ~~$500,500/Yr~~
Sewer Subtotal		$12,041,000		
Water Grant Amount		$ 0		
Water Loan Amount	$3,551,000	~~8,031,000~~	→ ~~$266,800/Yr~~	$118,000/Yr
Water Subtotal		$ 8,031,000		

Slide #19

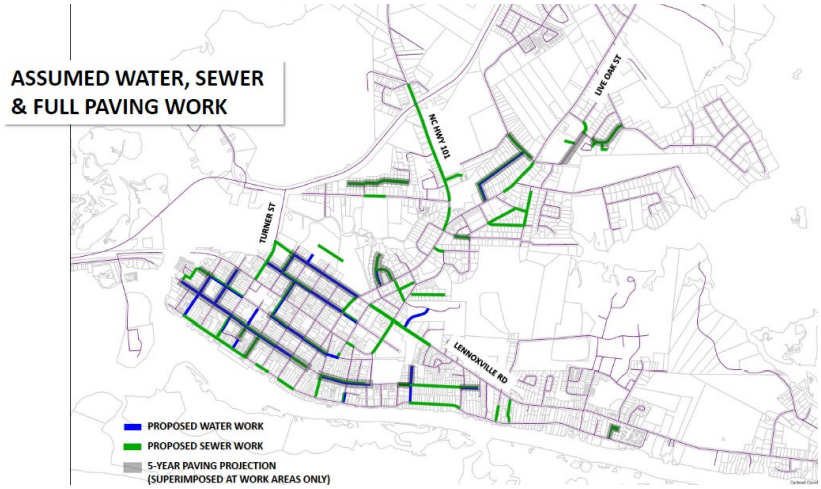


Greg Meshaw said based on the revision to the water loan project to satisfy the $350,000 in debt service goal, the streets in red would be eliminated from the original proposal.

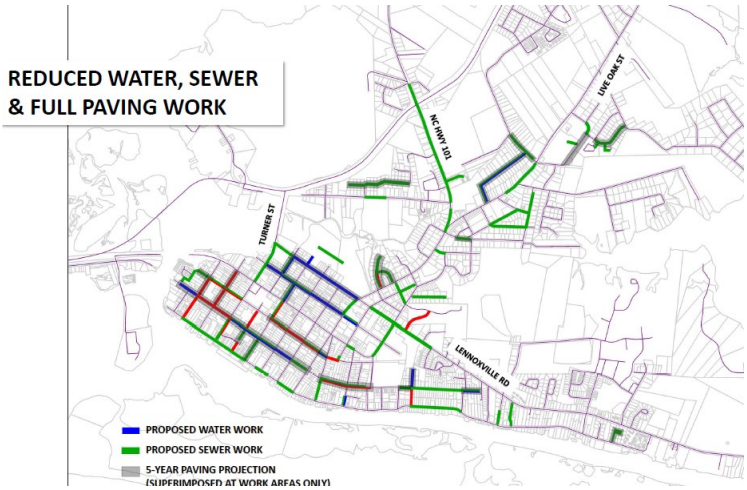
Slide #20



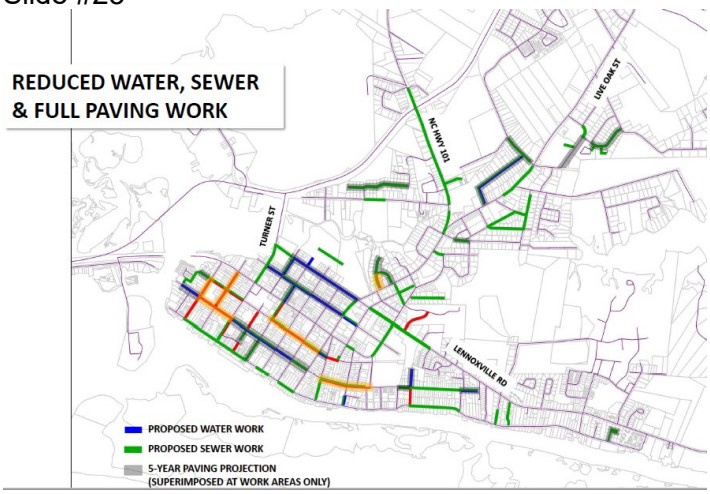
Slide #21



Slide #22



Slide #23



Mayor Pro-Tempore McDonald asked for clarification on the actual streets that were impacted by this project. He said it was hard to identify the varying colors and what they represented.

Greg Meshaw said he would use his arrow to point out Cedar Street and from that Pine Street and Mulbery Street were colored lines that would receive work. He said Queen Street from Broad Street to Pine Street would receive work. He said Orange Street from Cedar Street down to Ann Street, then Moore Street down to Ann Street and over to Front Street also receives work. He said Lennoxville Road and NC Highway 101 would also receive work. Other streets outside of the downtown area would include: Ronnie Road, Crescent Drive, Wellons Drive, Glenda Drive, Sunshine Court, and Leonda Drive.

Greg Meshaw said the work was really spread out around town, but the focus would be primarily downtown as that is where the old infrastructure is located. He said work would be from Mulberry Street all the way down to Front Street.

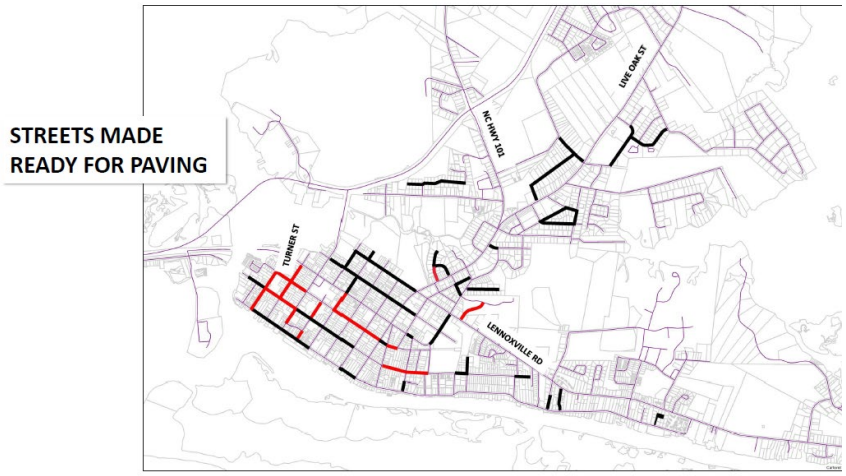
Mayor Pro-Tempore McDonald asked for a list of the streets that would not be included in this project.

Greg Meshaw said if the water project is reduced to service the debt with the money that can be allocated now, that would eliminate the following projects: Orange Street from Cedar Street to Ann Street, then Moore Street from Ann Street to Broad Street, then Ann Street goes away from Moore Street to Orange Street, then Orange Street goes away from Queen Street to Live Oak Street. He said Gordon Street towards Yapon Street and half of North Avenue would be reduced from the scope of the project.

Mayor Pro-Tempore McDonald said the areas that appear to be eliminated from this work are areas that grow the tax revenue in the last couple of years or so.

Greg Meshaw said the scope of the project primarily included downtown and as such the primary scope of the project would have to be reduced from downtown areas if the project was going to be reduced to fit the debt service availability.

Slide #24



Slide #25

STREETS MADE READY FOR PAVING



Slide #26

Funding the Additional $4.5 Million USDA Loan

Water User Rates

	EXISTING RATES		POTENTIAL RATES $149,000/YEAR ADDED DEBT SERVICE	
	In-Town	Out-of-Town	In-Town	Out-of-Town
Fixed Charge (minimum)	$10.37	$20.74	$10.37	$20.74
Variable Charge (per 1,000 gallons)	$ 5.07	$ 7.61	$ 6.21	$ 9.32

Note:

- Out-of-Town rate multiplier is 2 for fixed charge and 1.5 for variable charge

Slide #27

Funding the Additional $4.5 Million USDA Loan

Water User Charges Examples

- Monthly usage @ **2,000 gallons**
- ¾-inch meter

MONTH CHARGES	@ EXISTING RATES		@ NEW RATES $149,000/YEAR ADDED DEBT SERVICE	
	In-Town	Out-of-Town	In-Town	Out-of-Town
Fixed Charge	$10.37	$20.74	$10.37	$20.74
Variable Charge	$10.14	$ 15.21	$ 12.42	$ 18.63
Total	$20.51	$35.95	$22.79	$39.37
			+$ 2.28	+$ 3.42

Slide #28

Funding the Additional $4.5 Million USDA Loan

Water User Charges Examples

- Monthly usage @ **4,700 gallons**
- ¾-inch meter

MONTH CHARGES	@ EXISTING RATES		@ NEW RATES $149,000/YEAR ADDED DEBT SERVICE	
	In-Town	Out-of-Town	In-Town	Out-of-Town
Fixed Charge	$10.37	$20.74	$10.37	$20.74
Variable Charge	$23.83	$ 35.74	$ 29.19	$ 43.78
Total	$34.20	$56.48	$39.56	$64.52
			+$ 5.36	+$ 8.04

Slide #29

Funding the Additional $4.5 Million USDA Loan

Water User Charges Examples

- Monthly usage @ **10,000 gallons**
- **1½** -inch meter

MONTH CHARGES	@ EXISTING RATES		@ NEW RATES $149,000/YEAR ADDED DEBT SERVICE	
	In-Town	Out-of-Town	In-Town	Out-of-Town
Fixed Charge	$34.53	$ 82.96	$34.53	$ 82.96
Variable Charge	$50.70	$ 76.05	$ 62.10	$ 93.15
Total	$85.23	$159.01	$96.63	$176.11
			+$11.40	+$ 17.10

Slide #30

Funding the Additional $4.5 Million USDA Loan

Water User Charges Examples

- Monthly usage @ **25,000 gallons**
- **2**-inch meter

MONTH CHARGES	@ EXISTING RATES		@ NEW RATES $149,000/YEAR ADDED DEBT SERVICE	
	In-Town	Out-of-Town	In-Town	Out-of-Town
Fixed Charge	$ 55.27	$147.25	$ 55.27	$147.25
Variable Charge	$126.75	$190.13	$155.25	$232.88
Total	$182.02	$337.38	$210.52	$380.13
			+$ 28.50	+$ 42.75

Slide #31

Funding the Additional $4.5 Million USDA Loan

Water User Charges Examples

- Monthly usage @ **60,000 gallons**
- **3**-inch meter

MONTH CHARGES	@ EXISTING RATES		@ NEW RATES $149,000/YEAR ADDED DEBT SERVICE	
	In-Town	Out-of-Town	In-Town	Out-of-Town
Fixed Charge	$110.65	$333.91	$110.65	$333.91
Variable Charge	$304.20	$456.30	$372.60	$558.90
Total	$414.85	$790.21	$483.25	$892.81
			+$ 68.40	+$102.60

Slide #32

Funding the Additional $4.5 Million USDA Loan

Alternatives to Rate Increase

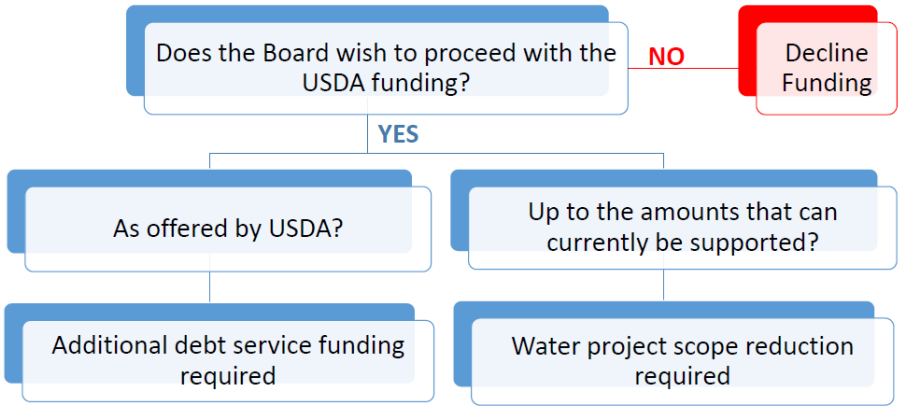
1. Budget utility revenues less conservatively to cover additional debt service requirement (including an additional amount equal to 10% of debt service as required by USDA)
2. Reduce payment to General Fund for administrative services
3. Any combination of 1 and 2
4. Any combination of 1 and 2 with a small rate increase

Important Consideration

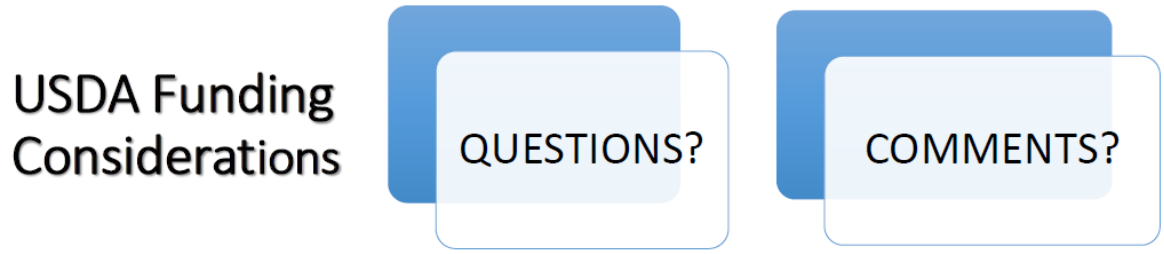
- Full accrual (business-type) accounting
  - $600,000 Utility Fund loss in FY19
  - $700,000 gain in FY20
  - $100,000 over 2-year period

Slide #33

USDA Funding Considerations



Slide #34



Commissioner Harker said this was a great presentation and very well explained. She asked if a decision on whether to decrease the amount of the loan from the water project in order to pay for debt service was needed in conjunction with accepting the grant.

Greg Meshaw said he would defer to Manager Day, however, as long as the Board could reach a general consensus on figuring the details out the primary goal was to be able to notify USDA if the Board was interested in accepting the offer.

Commissioner Harker said the offer presented is attractive and the Town was receiving more in some areas than projected like stormwater. She said the key is figuring out how to make the money spread out more over the various sewer projects.

Commissioner Harker said she would like to see the Board consider voting to accept the USDA grant/loan proposal and for the Board to work out the differences later as far as how much gets allocated to what projects.

Mayor Pro-Tempore McDonald asked if this work could be done inhouse by employees.

Manager Day said the short answer is no.

Commissioner Harker asked if the residents who own second homes in Beaufort or own homes but are not considered full-time residents here, could be charged a fixed rate fee.

Manager Day said that would be problematic.

Commissioner Hollinshed said the water rates and sewer rates are tied together and she asked if the water rates would double even if residents are not using any more water.

Greg Meshaw said no, the sewer rates would remain the same.

Commissioner Carter said she would like some additional time to study the proposals presented as the current climate is hard to judge with all that was going on.

Mayor Newton asked Manager Day if he could clarify what was needed exactly from the Board.

Manager Day said staff anticipated being able to give a decision after the meeting tonight as to whether the Board was going to move forward with the offer, not necessarily on the method of how we're going to pay the debt service. He said there are other ways to do it as as mentioned in the presentation with which is really just sort of shifting money around and not really not raising any rates. He said that's the important thing to to remember that that is one of the alternatives.

Manager Day said when staff spoke yesterday to USDA representatives, they originally wanted an answer from the Town very soon, although staff, as Greg said, didn't get the number on the stormwater until today. He said he could seek from USDA an official deadline for when they need to know something, but he would strongly suggest that opportunity be taken.

Manager Day said the financing for the water is not anything that the Town can get anywhere else in terms of low interest rates and in this kind of repayment term. He said we all know; these are significant problems that that have needed to be addressed for quite some time.

Manager Day said the only way to really pave the streets in a way that is not going to lead to them being cut up and patched very quickly is to do the work first. He said the process would be complicated and time consuming but this would be worked through with the USDA. He said staff has spent months working on the funding application and it was a huge project and very complex.

Manager Day said he hoped the Board would reach a decision tonight on at least moving forward with the project in its entirety. He said the details of the $350,000 could be worked out at the Board's retreat coming up in the next week. He said he thinks staff can present a work around that is satisfying to the Board.

Commissioner Hagle said he agreed with the Manager. He asked if the recommendation was to move forward with one of the alternatives presented in the PowerPoint slide.

Manager Day said he would recommend going with a combination of alternative options one or two but not either of them singularly.

Commissioner Hagle said he would agree and support the offer.

Mayor Pro-Tempore McDonald said he agreed with the offer, but with no increases to water rates or property taxes.

Commissioner Carter asked if the $600,000 utility reimbursement that was for administrative was removed or reduced how would that impact the utility fund.

Manager Day said the Utility Fund isn't paying the General Fund for the services provided, but there are two things that happen. He said the General Fund ends up providing some subsidy to the utility fund for it's operation and that has gone on for a number of years.

Commissioner Carter said she didn't have a problem with the $600,000 from utilities as it appears a bit excessive.

Manager Day said a formula could be shared to help look at the estimates. He said the Board could receive a more precise estimate if there was interest to hire an accounting firm to do a cost allocation assessment, however this number was an estimate, and it could be reduced.

Commissioner Hagle said budgeting less conservatively in this line item could be done.

Commissioner Hollinshed asked how much savings was showing in the prior quarterly report.

Manager Day said that was about 0.5%.

Commissioner Hollinshed what exactly does this percentage calculate to.

Greg Meshaw said those exact figures were not at his finger tips but he could certainly share that figure with the Board.

A motion was made by Commissioner Harker to accept the USDA Financing Proposal, with an exception that the debt service and project detail would be discussed in greater detail at a later time.

Mayor Newton call each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS

Manager Day said thank you and staff would be working to prepare additional items for review at the Board's Retreat.

[MAYOR/COMMISSIONER COMMENTS]

Commissioner Harker said this was a great time for Beaufort to take a look at getting the roads and infrastructure taken care of, but it was also a time for the Board to be very diligent in their discussions on how to make the money last. She said she echoed the comments from all of the other Commissioners that there was not an appetite for raises property tax or water or sewer rates. She said thank you to the staff that worked extremely hard on this proposal and went above and beyond to make sure Beaufort received strong consideration.

Commissioner Hollinshed said a lot of work went into getting us to this point and lots of work would be going into this project.

Commissioner Hollinshed asked Greg Meshaw for an update on Orange Street.

Greg Meshaw said concrete working was taking place today on Orange Street. He said the next steps were to place the missing curb back in the street and that would serve as a boundary as the pervious concrete was scheduled to be put in place next.

Commissioner Carter said she had serious concerns about the amount debt burden that was being placed on the townspeople. She said she would not support any type of tax increase to support this project proposal.

Commissioner Hagle said it had been a long journey to get to this point, a number of years in the making. He said he agreed to not increase the rates or support a property tax increase. He said this was the best deal that appears to get the Town further down the road on rehabbing the utility system that needs refurbishing.

Mayor Pro-Tempore McDonald said there was a time that staff could preform a lot of this work except for the paving, however, he would go along with the majority of the Board.

Mayor Newton said just a couple short years ago the Town knew we had 40 to 60 billion dollars in infrastructure requirements in the town of Beaufort. He said at the time Manager Day stated the eligibility at the time was for 4 to 6 million dollars and now we are taking about 30 million dollars. He said he appreciated the professionalism of the staff and all their hard work.

Mayor Newton said this was not just about fixing potholes but also cleaning up the waterways because of the collapsed sewer systems leaching into the storm water systems. He said thank you to the Board of Commissioners, Town Staff and their coordination with residents, local business owns, churches, and non-profits.

[ADJOURN]

A motion was made by Commissioner Harker to adjourn the meeting.

Mayor Newton called the roll.

Roll call ensued.

VOTE: UNANIMOUS

The meeting adjourned at 4:54 p.m.

_____

Everette “Rett” Newton
Mayor

_____

Allen Coleman
Town Clerk

DRAFT

MINUTES
TOWN OF BEAUFORT
BOARD OF COMMISSIONERS
VIRTUAL WORK SESSION
APRIL 26, 2021
4:00 P.M.

Due to the State of North Carolina's Declaration of Emergency in response to the COVID-19 pandemic and per NCGS § 166A-19.24, the Town of Beaufort Board of Commissioners conducted a remote meeting using the Zoom application. Members of the Board of Commissioners participated in the meeting remotely.

The Town of Beaufort Board of Commissioners met remotely for a work session on Monday, April 26, 2021 at 4:00 p.m. with the following members present:

Mayor Everette Newton presiding
Mayor Pro Tempore Charles McDonald
Commissioner Ann Carter
Commissioner John Hagle
Commissioner Sharon Harker
Commissioner Marianna Hollinshed

Others Present: Town Manager John Day and Town Clerk and Assistant to the Town Manager Allen Coleman (All other staff members will be identified appropriately below)

Mayor Newton asked Town Clerk Allen Coleman to open the meeting to the public and provide public comment instructions.

Mayor Newton called the meeting to order at 4:00 p.m., welcomed everyone in attendance, and asked Town Clerk Allen Coleman to call the roll.
Roll Call ensued.

[AGENDA APPROVAL]
A motion was made by Commissioner to amend the meeting agenda as follows:
#9. Amendment to Homer Smith Marina Covenant – ***REMOVED***
#16. Beaufort Harbor and Waterways Master Plan Advisory Committee - ***ADDED***

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

[PUBLIC COMMENTS]
Logan Louis said

Susan Sanders said

[PROJECT UPDATES]

The Board received a presentation from the Town Engineer on current and/or active projects ongoing throughout the Town.

Greg Meshaw made the following PowerPoint presentation:

Slide #1

Project Updates

Town of Beaufort

April 26, 2021

Slide #2

Active Projects

13 Active Projects (March Workshop)

- 1 Parks & Recreation
- 3 Street and Pedestrian Improvements
- 6 Utility
  - → 1 Water
  - → 3 Sewer
  - → 1 Water & Sewer
  - → 1 Water, Sewer, and Stormwater
- 2 Stormwater
- 1 Building

Slide #3

Active Projects

13 Active Projects (Today)

- 1 Parks & Recreation
- 3 Street and Pedestrian Improvements
- 6 Utility
  - → 1 Water
  - → 3 Sewer
  - → 1 Water & Sewer
  - → 1 Water, Sewer, and Stormwater
- 2 Stormwater
- 1 Building

UNCHANGED

Slide #4

Active Projects

(1 through 7)

- Cedar Street Park
- FY20 Street Rehabilitation & Construction
- Turner Street 100 Block Pedestrian Improvements
- Town Wide Sidewalks (Part 5-FY20 Street Rehabilitation & Construction)
- Cedar Street Water & Sewer Rehabilitation & Replacements
- Campen Road Waterline Extension/Upgrade
- USDA Funding Applications (Water, Sewer & Stormwater)

Slide #5

Active Projects

(8 through 13)

- Wastewater Asset Inventory Assessment
- High-Rate Infiltration System Permit Requisition
- ECHS Sewer Pumping Issue Investigation
- Meeting Street Drainage Improvements
- Charles Street Area Drainage Improvements/Maintenance
- Town Hall Entrance Improvements

Slide #6

Active Projects

(1 through 7)

- Cedar Street Park
- FY20 Street Rehabilitation & Construction
- Turner Street 100 Block Pedestrian Improvements
- Town Wide Sidewalks (Part 5-FY20 Street Rehabilitation & Construction)
- Cedar Street Water & Sewer Rehabilitation & Replacements
- Campen Road Waterline Extension/Upgrade
- USDA Funding Applications (Water, Sewer & Stormwater)

Slide #7





FY20 Street Rehabilitation and Construction

Concrete Work

- ✓ Replace **467 feet** of rolled curb
- ✓ Replace **82 feet** of curb & gutter
- ✓ Replace **69 sq. yards** of sidewalk
- ✓ Replace **16 each** concrete curb ramps

Pavement Markings

- ✓ **75 feet** of 4" wide white lines
- ✓ **1,078 feet** of 4" wide yellow lines
- • **387 feet** of 24" wide crosswalk lines 231 feet complete

Seal Coating

- • Marsh Street, Broad to Mulberry — Mid-May

Slide #8





FY20 Street Rehabilitation and Construction

- ✓ Stanton Road
- ✓ Hedrick Street
- ✓ Mashburn Avenue
- ✓ Professional Park Drive
- ✓ Jefferson Street
- ✓ Eastern Avenue
- ✓ Ricks Avenue
- ✓ Sherwood Boulevard
- ✓ Live Oak Street 100 Block
- ✓ Gordon Street
- ✓ Laurel Drive
- ✓ Sandra Drive
- ✓ Craven Avenue
- ✓ Carteret Avenue
- ✓ Pollock Street
- ✓ Olivia Road
- ✓ Live Oak Street 300 Block
- ✓ Taylors Creek Road
- ✓ Campen Road

DEVELOPING PUNCH LIST

Slide #9

FY20 Street Rehabilitation and Construction

Orange Street

Complete!





Slide #10

FY20 Street Rehabilitation and Construction

New Street Construction

- ✓ Howard Jr. Lane
- Souza Development Access Street
  - Paused
  - Stormwater Permitting



Slide #11

Turner Street 100 Block Street Improvements (West Side)

- Completed (Front St to FishTowne)
  - Utility Relocations
  - Retaining Wall
  - Steps
  - Pavers
  - Concrete sidewalks/patios



1
2
3 Slide #12

Turner Street 100 Block Street Improvements (West Side)

- Remaining (Front St to FishTowne)
  - Pedestrian Refuge Island
  - Plantings
  - Bicycle Rack & Trash Receptacle Placements
  - Pavement Markings
  - Curb & Gutter Replacement (Added Item of Work)



4
5
6
7
8 Slide #13

Turner Street 100 Block Street Improvements (West Side)

- Remaining (Front St to FishTowne)
  - Pedestrian Refuge Island
  - Plantings
  - Bicycle Rack & Trash Receptacle Placements
  - Pavement Markings
  - Curb & Gutter Replacement (Added Item of Work)

April 30th Goal



9
10
11 Slide #14

Turner Street 100 Block Street Improvements (West Side)

- Next
  - Additional Sidewalk Demolition
  - Elevated Crosswalk
  - Second Pedestrian Refuge Island (Middle Lane)
  - Pavement Markings



EXHIBIT 3

1
2
3 Slide #15



4
5
6
7
8 Slide #16

Cedar Street Utility Rehabilitation & Replacements

- Work nearly complete
  - Disinfect New Water Main (Craven to Marsh St)
  - Disconnect Old Water Main (Craven St to Marsh St)
  - Paving
  - Cleanup
- May 3rd Completion (Schedule)
  - May 7th probable



9
10

Slide #17

Active Projects

(8 through 13)

- Wastewater Asset Inventory Assessment
- High-Rate Infiltration System Permit Requisition
- ECHS Sewer Pumping Issue Investigation
- Meeting Street Drainage Improvements
- Charles Street Area Drainage Improvements/Maintenance
- Town Hall Entrance Improvements

Slide #18

Charles Street Area Drainage Improvements/Maintenance

- To do
  - Obtain temporary access agreements
  - Grading
  - Pipe flushing
  - Pipe joint repairs
- Currently
  - Twelve temporary access agreements obtained
  - One access agreements to be obtained



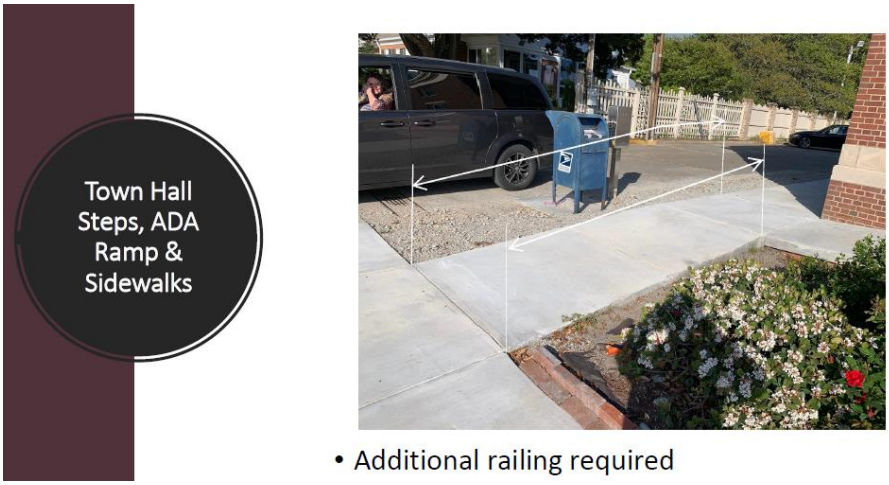
Slide #19

Town Hall Steps, ADA Ramp & Sidewalks



- Additional railing required

Slide #20



Slide #21



Commissioner

[ITEMS FOR DISCUSSION AND CONSIDERATION]

1. Resolution Honoring and Remembering the Life of Joyce Fulford Former Mayor of the Town of Beaufort N.C.

The Board discussed a resolution honoring and remembering Joyce Fulford, former Mayor of Beaufort, who passed away Monday, April 19, 2021.

Mayor Newton presented the following information:

BACKGROUND:

On April 19, 2021, Former Mayor Joyce Fulford passed away at her home in Beaufort, N.C. Ms. Fulford was elected as Mayor of the Town of Beaufort in 1980 and proudly served until 1986. She was the first female mayor to be elected as Beaufort Mayor.

Joyce served at First Citizens Bank in Beaufort for 38 years and retired as Vice President.. She was active in the early beginnings of the Beaufort Historic Association and was a devoted member of Ann Street United Methodist Church.

Joyce was also a very talented seamstress and enjoyed needlepointing and any needle arts. She was a phenomenal cook and loved to garden and keep up her flowers. Joyce was a loving wife, devoted mother, and a loving grandmother, step-grandmother, and great-grandmother.

RES-2021-002

Resolution Honoring and Remembering the Life of
Joyce Fulford
Former Mayor of the Town of Beaufort

WHEREAS, Joyce Fulford, Former Mayor of the Town of Beaufort passed away at her home in Beaufort on Monday, April 19, 2021; and

WHEREAS, Joyce Fulford was elected Mayor of the Town of Beaufort in 1980 and proudly served as Mayor until 1986; and

WHEREAS, Joyce fearlessly served as the first woman Mayor of the Town Beaufort; and

WHEREAS, she served at First Citizens Bank in Beaufort for 38 years and retired as Vice President, and

WHEREAS, Joyce very actively served her community and was involved in the early beginnings of the Beaufort Historic Association, and

WHEREAS, Joyce was a phenomenal cook and loved to garden and keep up her flowers, and

WHEREAS, she truly loved Beaufort's long and rich history, unique culture, and community spirit; and

NOW, THEREFORE, BE IT RESOLVED that we, the Board of Commissioners of the Town of Beaufort on behalf of the Town residents, officials, and employees, honor and remember Joyce Fulford for her spirit, her energy, and her innumerable contributions to Beaufort and beyond; and

BE IT FURTHER RESOLVED that the Board extends condolences to her children Terry and Kay, and all of Joyce's family and friends.

ADOPTED, this the 26th day of April 2021.

_____
Everette S. "Rett" Newton,
Mayor

Attest:

_____
Allen Coleman,
Town Clerk

Mayor Newton said

A motion was made by Commissioner to read the resolution again at the Board's Virtual Regular Meeting on May 10, 2021 and change the date of adoption to reflect the same.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

2. Minutes

The Board considered draft meetings from prior Board meetings.

Allen Coleman, Town Clerk and Assistant to the Town Manager, presented the following information:

BACKGROUND:

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Commissioner Carter asked if the funds associated would be reimbursed once the Town received the loan or the grant.

Greg Meshaw said yes.

Commissioner Hagle said there were essentially two parts, one being the basic expenditure portion for design and another for a resident project observer that would be performed by Rivers and Associates.

Greg Meshaw said this was for full-time on-site inspections. He said the resident observer was basically the eyes and ears of the engineer who designed the project so that at the end of the project the design engineer can certify to the State of North Carolina the work associated with the project was done in accordance with the plans and specifications.

Commissioner Hagle asked if those funds represented the $985,000.

Greg Meshaw said yes.

Commissioner Carter asked if the Town would be required to provide housing to this individual.

Greg Meshaw said that was some of the cost but primarily it was for travel.

A motion was made by Commissioner Hagle to:

a. Approve the engineering services agreements for the USDA-funded water, sewer, and storm water improvement projects,
b. Authorize the Town Manager to execute the agreements and;
c. Approve the budget amendment transferring the funds necessary to underwrite the consulting engineer services from capital reserves to project accounts established by the budge amendment.

Mayor Newton reminded the Board the motion was for multiple parts.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

3. Request to Rezone 1001 Cedar Street from R-8 to CS-MU – Case No. 21-02

The Board considered voting to approve a request to rezone 1001 Cedar Street from R-8 Residential to CS-MU Cedar Street Mixed Use District.

Kate Allen, Town Planner, presented the following information:

BACKGROUND:
The Board of Commissioners conducted a public hearing at the March 8th Regular Meeting. Public comments were accepted for 24-hours following the hearing; there were none.

Property owner, Bradley Cummins, is requesting to rezone 1001 Cedar Street from R-8 Residential to CS-MU Cedar Street Mixed Use District.

The Planning Board reviewed the request at the February 15, 2021 meeting and found the request consistent with the CAMA Future Land Use Map. 5/5 members in attendance unanimously recommended approval of the request.

Commissioner Carter asked if there were any objections to the rezoning request.
Kate Allen said there was no feedback received after the public hearing.
Commissioner Hagle said the expansion on Cedar Street mixed use into the next block, which is primarily residential, if from a planning standpoint that was permissible.
Kate Allen said Kyle Garner and her thought the rezoning was reasonable considering the growth patterns for this area. She said the area in question served as a nice buffer between residential and commercial use.

A motion was made by Commissioner Hollinshed to approve the request to rezone 1001 Cedar Street from R-8 to CS-MU; Cedar Street Mixed Use.

Commissioner Hollinshed read the following consistency statement and ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE 1001 CEDAR STREET FROM R-8 to CS-MU
ORDINANCE NO. 21-05

Applicant:	Bradley Cummins
Location:	1001 Cedar Street
Parcel ID:	730618404112000
Lot Size:	0.24 acres
Existing District:	R-8 Residential District
Meeting Date:	March 8, 2021
Requested District:	CS-MU Cedar Street Mixed Use District

WHEREAS, the Applicant has submitted a request to rezone the above referenced property to CS-MU; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on February 15, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on March 8, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, at the March 22, 2021 meeting the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of CS-MU is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan - Future Land Use Map.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 1001 Cedar Street to CS-MU Cedar Street Mixed Use District is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner Hollinshed and carried on a vote of 5 in favor and 0 against.

This, the 22nd day of March, 2021

TOWN OF BEAUFORT

Everette (Rett) Newton, Mayor

Allen Coleman, Town Clerk

SEAL OF TOWN OF BEAUFORT • NORTH CAROLINA
17 22
INC. 1722

1

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

4. Request to Rezone 502 Cedar Street from TR to CS-MU; Case No. 21-03

The Board considered a rezoning request to add continuity to the 500 block of Cedar Street regarding the zoning of Mixed Use.

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:

At the March 8th Commissioners a public hearing was conducted via zoom, however a decision was not made due to the requirement to wait 24 hours for written comments. The request is that the Commissioners make a decision to approve or deny the request and provide a consistency statement.

At the January 19th meeting the Planning Board requested that staff submit a rezoning request for this parcel to add continuity to the 500 block of Cedar Street regarding the zoning of Mixed Use. Per the Boards request staff is submitting 502 Cedar Street for rezoning from TR to CSMU.

At their February 15, 2021 meeting the Planning Board recommended unanimously to rezone 502 Cedar Street from TR to CS-MU.

Director Garner said to follow-up on Commissioner Hagle's question on the last item, he would echo agreed with Kate Allen that the pattern is fine. He said it will be interesting to see if it stays consistent in the CAMA Land Use Plan that was currently be updated.

A motion was made by Commissioner Hagle to approve the request to rezone 502 Cedar Street from TR to CS-MU.

Commissioner Hagle read the following consistency statement and ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE ~~508 & 510~~ Cedar Street FROM TR to CS-MU
ORDINANCE NO. 21-06

(@ 502

Applicant:	Town of Beaufort Staff
Location:	502 Cedar Street
Parcel ID:	730618215164000
Lot Size:	15,143 Sq. ft. Total (based on GIS data)
Existing District:	TR (Transitional)
Meeting Date:	March 8, 2021
Requested District:	CS-MU – Cedar Street – Mixed Use

WHEREAS, the Town of Beaufort Planning Staff has submitted a request to rezone the above referenced property to CS-MU; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on February 15, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on March 8, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of CS-MU is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 502 Cedar Street to CS-MU is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner Hagle and carried on a vote of 5 in favor and 0 against.

This, the th day of March 2021

TOWN OF BEAUFORT

Everette (Rett) Newton, Mayor

Allen Coleman, Town Clerk

SEAL OF TOWN OF BEAUFORT · NORTH CAROLINA · 17 22 · INC. 1722

Attachment - F

1

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

5. Request to Rezone 823 West Beaufort Road from R-8 to B-1; Case No. 21-04

The Board considered a request to rezone 823 West Beaufort Road from R-8 residential to B-1 General Business District.

Kate Allen, Town Planner, presented the following information:

BACKGROUND:

The Board of Commissioners conducted a public hearing at the March 8th Regular Meeting. Public comments were accepted for 24-hours following the hearing; there were none.

Janine Facciola is requesting to rezone 823 West Beaufort Road from R-8 Residential to B-1 General Business District.

The Planning Board reviewed the request at the February 15, 2021 meeting and found the request consistent with the CAMA Future Land Use Map. 5/5 members present unanimously recommended approval of the request.

A motion was made by Commissioner Hollinshed to approve the rezoning request of 823 West Beaufort Road from R-8 residential to B-1 General Business District.

Commissioner Hollinshed read the following consistency statement and ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE 823 WEST BEAUFORT ROAD FROM R-8 to B-1
ORDINANCE NO. 21-07

Applicant:	Janine Facciola
Location:	823 West Beaufort Road
Parcel ID:	730615634587000
Lot Size:	0.474 acres
Existing District:	R-8 Residential District
Meeting Date:	March 8, 2021
Requested District:	B-1 General Business District

WHEREAS, the Applicant has submitted a request to rezone the above referenced property to B-1; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on February 15, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on March 8, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, at the March 22, 2021 meeting the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of B-1 is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan - Future Land Use Map.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 823 West Beaufort Road to B-1 General Business District is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner Hollinshed and carried on a vote of 5 in favor and 0 against.

This, the 22nd day of March, 2021

TOWN OF BEAUFORT

Everette (Rett) Newton, Mayor

Allen Coleman, Town Clerk

SEAL OF TOWN OF BEAUFORT • NORTH CAROLINA
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INC. 1722

1

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

6. Text Amendment modifying the Land Development Ordinance Section 20: Special Use Permits; Case No. 21-05

The Board discussed and considered a staff initiated text amendment modification proposal to replace the term "public hearing" with "quasi-judicial proceeding" in order to eliminate confusion between the legislative and quasi-judicial processes.

Kate Allen, Town Planner, presented the following information:

BACKGROUND:

Section 20: Special Use Permits, of the Land Development Ordinance, currently uses the language "public hearing." Staff is requesting the term "public hearing" be changed to "quasi-judicial proceeding" in order to eliminate confusion between the legislative and quasi-judicial processes. Staff has consulted with the Town Attorney to ensure the request is consistent with the North Carolina General Statutes.

Commissioner Harker asked for additional clarification on what exactly was confusing.

Kate Allen said the current ordinance was written with the term public hearing leading staff to believe the 24-hour period comment period was applicable to special use permit applications.

Commissioner Harker said not only does this change the term but also the process.

Kate Allen said that was correct. She said with a quasi-judicial proceeding the Board could render a decision at the same time and would not have to wait a 24-hour comment period.

Commissioner Harker asked if the public would have the opportunity to comment at any point during this process.

Kate Allen said during a quasi-judicial proceeding only individuals with standing are eligible to comment and must be subscribed an oath prior to giving testimony. She said on text amendments any member of the public could comment but with special use permits only individuals with standing would be eligible to comment.

Commissioner Hollinshed said replacing the language will clean things up a bit and create less confusion in the future.

Commissioner Hagle said this process change will make things a lot easier and stream decisions.

A motion was made by Commissioner Hagle to schedule a public hearing for April 12, 2021, the next Board of Commissioners regular meeting, and consider the text amendment modification at that time.

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

7. Modify/Revise the Existing Planned Unit Development (PUD) for Beau Coast Subdivision

The Board considered the applicant-initiated request to modify several standards in the PUD Booklet Dated February 22, 2021 for Beau-Coast Subdivision.

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:
The applicant wishes to modify the following standards in the PUD Booklet Dated February 22, 2021 for Beau Coast Subdivision:

- Convert a section of eight (8) 22' wide townhome lots (existing lots 119-126) to four (4) single family lots (50' wide): Net loss of four (4) dwelling units; (See Attachment – A – Vicinity Map for location of lots.)
- Convert two (2) 20 foot wide townhome lots (lots 177 & 178) to one (1) 40' wide single family lot: Net loss of one (1) dwelling unit; o Total net loss of 5 dwelling units. (See Attachment – A – Vicinity Map for location of lots.)
- Add permeable pavement specifications to the PUD document for alleys, on-street parking areas, and sidewalks as an option for use in the PUD;
- Add note regarding lot configuration options

At their March 15, 2021 meeting, the Planning Board unanimously recommended to Modify the PUD for Beau Coast Subdivision with the above four revisions.

Director Garner said the Town Clerk had proposed a change in process for the public hearing items. He said instead of the Board receiving these items multiple times, the Board could vote on the proposal after the public hearing and place a contingency pending any written public comments. He said if written comments were received the Board would default to hearing those comments at the next work session.

Mayor Newton asked if this change had been vetted through the Town's Attorney.

Director Garner said yes.

A motion was made by Commissioner Hagle to schedule a public hearing for April 12, 2021, the next Board of Commissioners regular meeting, and consider the modification request at that time.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

8. Final Plat – Beau Coast Phase V
The Board discussed an applicant-initiated request to subdivide a 15.31-acre tract into 86 lots (49 Single Family Residential Lots and 37 Townhome Lots).

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:
The applicant wishes to subdivide a 15.31 acre tract into 86 lots (49 Single-Family Residential Lots & 37 Townhome Lots). In addition to Planning Staff, the Town Engineer and applicants Engineer will also be available to answer questions regarding the proposed infrastructure.

At their March 15, 2021, meeting, the Planning Board recommended unanimously to approve the Final Plat.

A motion was made by Commissioner Carter to consider this request at the April 12, 2021 Board of Commissioners Regular Meeting and place this item under discussion.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

9. Preliminary Plat – Beaufort East Village Phase 1 – Case No. 21-08

The Board discussed an applicant-initiated request to subdivide a 41.79-acre tract into 108 lots (60 Single-Family Residential Lots and 48 Townhome Lots).

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:

The applicant wishes to subdivide a 41.79 Acre Tract into 108 Lots (60 Single-Family & 48 Townhouses). In addition to Planning Staff, the Town Engineer and applicants Engineer will also be available to answer questions regarding the proposed infrastructure.

At their March 15, 2021 meeting, the Planning Board recommended unanimously to approve the Preliminary Plat.

A motion was made by Commissioner Carter to consider this request at the April 12, 2021 Board of Commissioners Regular Meeting and place this item under discussion.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

10. Rotary Beaufort Historic Road Race

The Board considered an event application submitted by the Beaufort Ole Towne Rotary for the Historic Beaufort Road Race.

Rachel Johnson, Parks and Events Coordinator and Public Information Officer, presented the following information:

BACKGROUND:

Event organizers for the Historic Beaufort Road Race run by the Beaufort Ole Towne Rotary have submitted an event application to host the annual event on Saturday, June 12 2021. This is a change for the event that has traditionally been held in late July.

In addition to their event application, attached is the organizations' COVID-19 safety procedures.

The event requests the closure of the West parking lot. Staff has reviewed the application and raises the concern of a potential conflict if the closure of the West Parking Lot is approved. June 12 is the Big Rock fishing tournament's KWLA fishing tournament for lady anglers as such the parking area is often filled with participants at an early hour.

Organizers have also requested assistance with the fees associated with the event as outlined below.
* June 12, 2021

* Set-up 6 a.m. - Finished by 10 a.m.
* Request traditional 10K route
* Request Turner Street be closed from Middle Lane to Front Street from 6 -10 a.m.
* Request Front Street be closed from Orange to Queen Streets during race
* Request closure of the West Parking lot to reopen by 10 a.m.
* Request paid parking be suspended until 10:30 a.m.
* Event will provide volunteers to help supplement public safety personnel at intersections along Front Street
* Request assistance with fees. Traditionally they have received an event grant from the Town. This funding is unavailable for the 2021 event season due to the lack of a parking season in 2020. Fees incurred will come from closure of the West Parking lot during Paid Parking season, police/fire personnel to close streets and safety and trash/recycling services. The estimated total based on past years is around $450 without parking lot closure fees.

Rachel Johnson said the application request inadvertently said the west parking lot, but it was John Newton Park. She said this would clarify any confusion around parking.

Commissioner Harker said the COVID-19 safety procedures included in the event application were presented well.

A motion was made by Commissioner Hagle to approve the event application request submitted by the Beaufort Ole Towne Rotary for the Historic Beaufort Road Race on Saturday, June 12, 2021.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

11. Residential Solid Waste Fee Increase

The Board discussed a 27-cents per month increase in the Residential Solid Waste Fee; (from $19.17 to $19.44).

Christi Wood, Finance Director, presented the following information:

BACKGROUND:

Per our residential service agreement with Waste Industries (now GFL), the monthly fee shall be adjusted on an annual basis to reflect the annual adjustment based on the Consumer Price Index for All Urban Consumers (CPI-U): South Region, as published by the US Department of Labor. Effective April 1, 2021, the rates will be increased by 1.4% for residential services. The notice from GFL is attached.

The term of the contract for Residential Service with GFI is 7 years: March 2017-February 2024. It can be extended for an additional 5 years. This contract was executed in November, 2016.

The term for the contract for WBD Service with GFI is also 7 years: July 2017 – June 2024. It can be extended for an additional 5 years. This contract was executed July, 2017.

A motion was made by Commissioner Hagle to include this item under consent for the April 12, 2021 Board of Commissioners Regular Meeting.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

12. FY 2021 Budget Amendment No. 8

The Board considered a budget, grant, and capital project ordinance amendment for fiscal year 2020-21, which appropriates $6,500 of General Fund balance to purchase a new HVAC unit for the Public Works Wood Shop.

Christi Wood, Finance Director, presented the following information:

BACKGROUND:

This amendment requests a Fund Balance appropriation for a new HVAC unit for the Public Works Wood Shop. The current unit is 22 years old and has stopped working due to a rusted accumulator. A repair has been quoted for $2,000 but will still leave a 22-year-old unit. The cost for a new unit is $6,500.

Commissioner Carter asked if an investigation had been conducted because the cost seemed high.

Director Wood said the Town was required to have three quotes and all of the quotes were around the same price point.

A motion was made by Commissioner Harker to include this item under consent for the April 12, 2021 Board of Commissioners Regular Meeting.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

13. February 2021 Financial Report-Notes

The Board received the Town's February 2021 Financial Report and Notes.

Christi Wood, Finance Director, presented the following information:

BACKGROUND:

Tax collections for January and February are listed below

January		
Tax Year	Balance Remaining	Collection Rate to Date
2014	$2,400	99.91%
2015	$7,614	99.70%
2016	$18,519	99.30%
2017	$21,944	99.25%
2018	$29,954	99.08%
2019	$65,549	98.29%
2020	$194,294	95.94%
February		

Tax Year	Balance Remaining	Collection Rate to Date
2014	$2,400	99.91%
2015	$7,267	99.72%
2016	$16,674	99.37%
2017	$21,834	99.26%
2018	$28,834	99.12%
2019	$60,221	98.43%
2020	$150,799	96.85%

- Sales and Use tax distribution for March is $177,189 (December sales)

Commissioner Carter asked if every employee was covered under Worker's Compensation because some departments showed an account and others did not.

Director Wood said some departments are lumped together.

Commissioner Hagle said the income from property tax and sales tax was coming in over projection. He asked if this was a trend and what the forecasted amounts were through the end of the fiscal year.

Director Wood said the actuals were coming in a little higher than projection. She said the property tax collections had likely reached a peak for this fiscal year and the Board would start to see a steady decline until the end of the fiscal year.

Commissioner Hagle asked how much of a decrease could be expected.

Director Wood said she could run a few reports and analysis and send those projections out to the Board for their review.

Commissioner Hagle said that would be helpful and if a projection for sales tax could be included as well.

Manager Day said the Board had talked about Sales Tax Revenue and the potential for it to diminish as the year continued but that declined hasn't happened yet.

14. Beaufort Harbor and Waterways Master Plan Advisory Committee

The Board discussed the charge and composition for the proposed Beaufort Harbor and Waterways Master Plan Advisory Committee.

John Day, Town Manager, presented the following information:

BACKGROUND:

As discussed at the February 2020 Town Board retreat, a comprehensive harbor and waterways master plan is needed to address water quality, harbor management, the expiration of the current Beaufort Docks and National Park Service leases in 2024, the possible development of a mooring field, and how such items impact the timing of the replacement of the Front Street bulkhead and boardwalk.

At this year's Town Board retreat it was decided that an advisory committee should be appointed to assist in the effort. This committee will engage the public and work with the town's staff and consultant to advise the Board of Commissioners during the formation of a Beaufort Harbor & Waterways Master Plan.

The Board also discussed preparation of an updated application for appointments to boards

and committees, including a question related to applicants' "connection" to Beaufort. There was consensus that there should not be a residency requirement for all appointees to this committee, and that there should be full disclosure of any potential financial implications for members.

A draft description of the committee background, charge, and composition is attached. Also, a draft application for boards and commissions will be introduced at the meeting.

Commissioner Carter said the Board had originally requested that the new committee be comprised of six members and each member of the Board would be eligible to appoint one individual. She said she objected to the current proposal which allowed the Mayor to select two individuals.

Commissioner Carter said water quality was listed as the primary element of this committee and this was not a concept a small group would be able to deal with.

Commissioner Harker said the Board had originally agreed to having a smaller group and was not opposed to having individual appointments. She said the understanding was applications would be received similar to any other appointment vacancy and the Board would work through those together to ensure good representation was on the committee. She asked if the committee members would serve a number of terms before having to be re-appointed or rolling off.

Manager Day said this decision was up to the Board but it may be beneficial to have the committee members serve for the duration of the project but the consultant may need to weigh in on this as well. He said the Board had discussed having five, six, and even seven members on this committee and this was a decision for the Board.

Mayor Pro-Tempore McDonald said he didn't have an issue with the number of positions on this committee but expected the individuals that were appointed to be just, fair, and work for the betterment of the Town of Beaufort.

Commissioner Hollinshed said based on her recollection the Board had discussed having five members, each appointed by a Commissioner, and a sixth member being appointed by the Mayor. She said if the Board wanted seven positions then that position could be an at-large and nominated by the entire Board.

Commissioner Hollinshed said that the money was in hand to hire Moffat and Nichols.

Mayor Newton asked if the Board wanted to bring Moffit and Nichols on board first before a definition was placed on the new advisory committee.

Commissioner Hollinshed said the stakeholder group and the consultant need to sit down at the same time together, equally.

Commissioner Hagle said appointments should be handled the same way the Town advertises and recruits for other positions. He said the Board should appoint all six positions or however many positions is designated.

Commissioner Carter said the Board would select the members from the applicant pool but in this case a certain applicant was preferred.

Commissioner Hagle said individuals throughout the community could be encouraged to apply but the process needed to stay the same.

Commissioner Harker said the emphasis would be on the new application and how the questions would be worded.

Commissioner Carter said the consultant really needed to get their feet wet before the committee was appointed.

Commissioner Hagle said consultant was very skilled in this type of work and should come at the same time as the committee members so everyone was starting from the same point.

Commissioner Carter said their were concerns about the consultant starting first and making decisions before the Committee was appointed.

Commissioner Hollinshed said that wasn't the intention and decisions would not be made before the committee was seated. She said bringing the consultants on board first would allow them time to prepare for the committee meetings.

Commissioner Carter said as long as the consultants are advisory and not making decisions then she supported bringing them on now.

Mayor Newton asked if it was possible to bring the consultants on and have them at the April 12, 2021 BOC regular meeting.

Manager Day said the Board did not need to approve a contract with Moffat and Nichols as this would be done in-house. He said the consultants were aware of this project and were on hold pending the Boards decision on timing. He said staff would begin the contractual process and routing through the attorney.

Manager Day said the Board had tossed around the idea of having six positions and possibly the Mayor being able to bring forward a name for appointment to the new committee. He said the Board also discussed having the option for applicants to follow the regular appointment process and clarification needed to be given.

Commissioner Hagle said the applicants should follow the normal appointment process.

Commissioner Carter said that was fine but any of the Commissioners could appoint someone as long as the individual was willing to serve.

Commissioner Hagle said the individual must apply and have an application on file.

Commissioner Hollinshed said it was up to the Commissioners to encourage qualified applicants to apply.

Commissioner Harker asked if the seventh member could be a tie-breaker appointment.

Commissioner Hollinshed said once the applications come in the Commissioners could chose to appoint additional members if a large pool of qualified applicants presented themselves.

Town Clerk Allen Coleman presented the Board of Commissioners with the new Volunteer Boards and Commissions application.

15. Manager and Board Evaluation Proposal

The Board reviewed and discussed the Town of Beaufort's Manager and Board Evaluation process proposal as recommended by the School of Government (SOG) at The University of North Carolina at Chapel Hill and provided direction to staff on next steps.

Commissioner Harker presented the following information:

BACKGROUND:

Donna Warner and Peg Carlson of the UNC School of Government worked with Commissioner Harker, Mayor Newton, and the Town Manager to develop a process for manager and board evaluation.

Donna Warner made a presentation at the December, 2020 Work Session explaining the proposed evaluation process. The presentation, proposal, and list of evaluation principles is attached.

Commissioner Carter said she completely disagreed with the proposal as it was presented. She said after attending the training at the School of Government the evaluation templates that were presented were very similar to those the Board has used in the past and

recommended the Board consider one of those as an option. She said the Manager evaluation templates from the City of Lexington as well as the Durham County Manager would be a good starting point. She said the school of government said each governing Board should think of themselves as a unit and not as individuals.

Commissioner Hagle said the form was important, but the process was key. He said evaluation discussions should be open and honest and anytime a group was evaluating one individual it could be challenging. He said the form would guide the discussion and help ensure transparency, solid expectations, and good results.

Mayor Pro-Tempore McDonald said the Board should operate as a group and share information, discuss items, and consider moving forward together. He said the course he attended did not reveal to him any difference procedures or processes than the Board was currently using and asked for clarification on what the intended outcome was from this discussion.

Commissioner Harker said the request was twofold. She said originally recommendation was for the Board to approve an evaluation process which would include an opportunity for the manager to provide a self-evaluation prior to the Board's input and this would be a change from the current setup. She said the second change was to consider the form that was used and allow the Manager an opportunity to provide feedback on the Board's performance.

Commissioner Harker said the City of Lexington's proposal may be an item for consideration but that information needed to be circulated to the entire Board. She said the process and timeline also needed to be determined and whether the Board would like for the evaluation and any type of merit raises to coincide with the fiscal year.

Commissioner Harker said the proposal still allowed for the Board to complete the evaluations individually and during a closed session discuss the individual reviews and compile those for a completed Manager evaluation from the Board as a group.

Commissioner Carter said the training revealed that merit raises and evaluations should not be tied together.

Commissioner Harker said it was unusual that the course did not say the two items could be completed at the same time because that differed from the conversations and training she and the Mayor had received from Peg Carlson and Donna Warner.

Mayor Pro-Tempore McDonald said he was from the old school and if the manager was not performing up to the appropriate standards then it should be discussed by the Board. He said communication was key and if the manager was not performing at the appropriate standards then their should be communication of specific examples throughout the year instead of waiting until the evaluation process. He said it would be helpful if the evaluation could include a spot for the Manager and the Board to set expectations on what each of them expected from each over in three years, five years, etc.

Commissioner Harker said that was the purpose of the form and it was critical to set expectations from the very beginning.

Mayor Pro-Tempore McDonald said out of the six members, including the Mayor, he was not aware of any conversation with the Town Manager where expectations were set and a thorough conversation around the Manager's job description was conducted. He said the Manager should have the opportunity to say whether he or she can perform certain elements of the job duties and what tools he or she may need to meet the expectations of the Board.

Commissioner Harker said Manager Day may want to elaborate on some of the points that had been raised so far.

Manager Day said the proposal did include a new form and the format was a little different but the process being recommended would include time for individual Commissioner reflection and then an opportunity for the Board to discuss their thoughts and comments as a group. He said the final rating would be done as an entire group at the facilitated evaluation session which was different than the current process.

Manager Day said the Board would need to reach a consensus or conclusion rather than just simply submitting their responses on a form.

Commissioner Hollinshed said the current proposal was not her favorite and that the Board should consider other forms that are a better fit for Beaufort. She said the Board of Commissioners answer to the people of Beaufort and are reviewed every four years at the time for elections. She said the emphasis should be on the Manager's ability to accomplish certain goals as designated by the Board and give him or her the tools to accomplish those goals. She said the Manager does not report to the people in the community unless the Board authorizes that relationship and their was to much emphasis on the monetary portion of the review.

Commissioner Hollinshed said it may be helpful and even needed to conduct two mini-reviews; one at the beginning of the fiscal year and a six month check in as this process unfolds. She said she liked the ideas that were presented by the School of Government and the Board could encompass some of those suggestions into their review process.

Commissioner Harker said the proposal that was currently presented outline several processes that could be considered as the Board worked to develop a unique process.

Commissioner Hollinshed said she disagreed with the proposal as written and said the training that was offered presented this information in a different light.

Mayor Newton said it was important that the Board operate by consensus verses giving individual goals and priorities preference. He said he agreed with Commissioner Hollinshed that it was important for the Board to clearly outline tangible goals and the process could be two mini-reviews. He said an informal session could be held in January and then a formal session in July or August to ensure the Manager was able to succeed with the Board's expectations.

Mayor Newton said the evaluation and merit raise conversations should be linked together but certainly the Board could hold two different discussions around the same time if that was the consensus by the Board.

Commissioner Hagle said the salary adjustment for the Manager should be made after the review and not discussed at the same time or the same meeting. He said it may be appropriate to review the merit raise discussion at the next closed session.

Commissioner Harker said there appeared to be consensus among the Board to go back to the drawing board and tweak the proposal to align more with what the Town of Beaufort needed.

Manager Day said he was interested to see the evaluation proposal from Durham County as that was what the School of Government used during their session as well.

Commissioner Carter said during the evaluation training several members agreed to using something similar to the Durham County's or the City of Lexington's proposals. She said Allen could send those documents to the entire Board so everyone could review those materials.

Town Clerk Allen Coleman said he would email the training materials that some of the Board members had received to the entire Board for their review.

Commissioner Harker said this meant the Board was going back to square one.

Commissioner Carter said the Board should be able to use one of the forms presented and go from there. She said the training encouraged the manager's evaluation and the Board evaluation be separate processes, but she did not see a need to evaluate the Board itself.

Commissioner Harker said the conversation about Board evaluation hit a high note with several members when this was presented in December of 2020.

Commissioner Hagle said the Board needed to review the various templates proposed so the Board could make a final decision at their next work session.

Commissioner Harker asked if the Board would like to consider a facilitator to help with the evaluation discussion.

Commissioner Carter said a facilitator was not needed as the Board was very compatible and respectful of others.

Commissioner Harker asked when the next work session was scheduled.

Town Clerk Allen Coleman said on April 26, 2021.

[MAYOR/COMMISSIONER COMMENTS]

Commissioner Carter said the Planning Board meeting was held and the Town's Attorney mentioned changes that would need to occur to mirror current legislative changes with 160-D. She asked if the Town was on track to having those in place by July.

Manager Day said yes, but the scope of the project was rather large and it would need to be out sourced.

Commissioner Hagle asked what the cost would be for the revision work.

Manager Day said one proposal was for $85,000 as this was not an inexpensive project.

Commissioner Hagle said the cost was excessive and a bit ridiculous from a tax payers perspective. He asked if the Town's Attorney could provide a reasoning behind why this was being done and the benefits of the changes.

Town Attorney Arey Grady said the end goal of the legislation would be good as the General Assembly really took all of the land use statutes applicable to counties and cities and consolidated them into one new chapter. He said the current Land Development Ordinance coupled with the new legislation in 160-D created a several hundred-page document for review.

Commissioner Hagle asked if the Land Development Ordinance would be compatible with the new legislation or if the Town would spend more money revising that document as well.

Attorney Grady said 160-D was geared to be primarily administrative regarding rules and regulations on permit issuance, violation enforcement, when to conduct a legislative or quasi-judicial proceeding, etc. He said the Land Development Ordinance would be more substance. He said the LDO and 160-D work addresses two different sides of the coin and while the work could be down simultaneously, it would likely be overwhelming.

Commissioner Harker said thank you to the staff for their hard work. She said there was a lot of traffic in downtown Beaufort on Front Street and she was excited to see things picking up in that area and hopefully that volume continued through the summer months.

Commissioner Harker said she appreciated everyone's input on the Board evaluation discussion and agreed that the Board should work together to reach a conclusion that worked for everyone.

Mayor Pro-Tempore McDonald said the citizens of Beaufort entrusted the Commissioners to make decisions in the best interest of the community. He said the Board evaluation process was cumbersome and it was time the Board work together and come to a conclusion.

Commissioner Hollinshed said the Board will likely come to a consensus must quicker than what may be expected. She said the Board had a lot of heavy items on their plate right now with the Harbor Committee, the Manger's evaluation, and the legislation requirements with 160-D.

Commissioner Hagle said there was a lot of thoughtful discussion today and everyone had been open and honest with one another. He said 160-D and the cost associated with those revisions was irritating and the General Assembly should work to make these types of revisions easier for small municipalities to maintain compliance.

Commissioner Hagle said the time had changed and may have some effect on peoples' sleep patterns. He said remember to drive defensively.

Mayor Newton said he appreciated the Boards ability to move through a very robust agenda with lots of good discussion.

[ADJOURN]

A motion was made by Commissioner Hagle to adjourn the meeting.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANIMOUS (5-0)

The meeting adjourned at 6:13 p.m.

_____
Everette “Rett” Newton
Mayor

_____
Allen Coleman
Town Clerk

DRAFT

MINUTES
TOWN OF BEAUFORT
BOARD OF COMMISSIONERS
VIRTUAL WORK SESSION
MARCH 22, 2021
4:00 P.M.

Due to the State of North Carolina's Declaration of Emergency in response to the COVID-19 pandemic and per NCGS § 166A-19.24, the Town of Beaufort Board of Commissioners conducted a remote meeting using the Zoom application. Members of the Board of Commissioners participated in the meeting remotely.

The Town of Beaufort Board of Commissioners met remotely for a work session on Monday, March 22, 2021 at 4:00 p.m. with the following members present:

Mayor Everette Newton presiding
Mayor Pro Tempore Charles McDonald
Commissioner Ann Carter
Commissioner John Hagle
Commissioner Sharon Harker
Commissioner Marianna Hollinshed

Others Present: Town Manager John Day and Town Clerk and Assistant to the Town Manager Allen Coleman (All other staff members will be identified appropriately below)

Mayor Newton asked Town Clerk Allen Coleman to open the meeting to the public and provide public comment instructions.

Mayor Newton called the meeting to order at 4:01 p.m., welcomed everyone in attendance, and asked Town Clerk Allen Coleman to call the roll.
Roll Call ensued.

[AGENDA APPROVAL]
A motion was made by Commissioner Hagle to approve the agenda as presented.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

[PUBLIC COMMENTS]
NONE

[PROJECT UPDATES]
The Board received a presentation from the Town Engineer on current and/or active projects ongoing throughout the Town.

Greg Meshaw made the following PowerPoint presentation:

Slide #1

Project Updates

Town of Beaufort

March 22, 2021

Slide #2

Active Projects

12 Active Projects

- 1 Parks & Recreation
- 3 Street and Pedestrian Improvements
- 5 Utility
  - → 1 Water
  - → 2 Sewer
  - → 1 Water & Sewer
  - → 1 Water, Sewer, and Stormwater
- 1 Stormwater
- 2 Building

Slide #3

Active Projects

12 Active Projects → 13

- 1 Parks & Recreation
  - → 2 Makeovers
  - → 1 New
- 3 Street and Pedestrian Improvements
- 5 Utility
  - → 1 Water
  - → 2 Sewer → 3
  - → 1 Water & Sewer
  - → 1 Water, Sewer, and Stormwater
- 1 Stormwater → 2
- 2 Building → 1

Slide #4

Active Projects

(1 through 7)

- Cedar Street Park
- FY20 Street Rehabilitation & Construction
- Turner Street 100 Block Pedestrian Improvements
- Town Wide Sidewalks (Part 5-FY20 Street Rehabilitation & Construction)
- Cedar Street Water & Sewer Rehabilitation & Replacements
- Campen Road Waterline Extension/Upgrade
- USDA Funding Applications (Water, Sewer & Stormwater)

Slide #5

Active Projects

(8 through 13)

- Wastewater Asset Inventory Assessment
- High-Rate Infiltration System Permit Requisition
- **ECHS Sewer Pumping Issue Investigation** **NEW**
- Meeting Street Drainage Improvements
- **Charles Street Area Drainage Improvements/Maintenance** **NEW**
- ✓ Town Hall Reception Area Renovation **COMPLETE**
- Town Hall Entrance Improvements

Slide #6

Active Projects

(8 through 13)

- Wastewater Asset Inventory Assessment
- High-Rate Infiltration System Permit Requisition
- **ECHS Sewer Pumping Issue Investigation** **NEW**
- Meeting Street Drainage Improvements
- **Charles Street Area Drainage Improvements/Maintenance** **NEW**
- ✓ Town Hall Reception Area Renovation **COMPLETE**
- Town Hall Entrance Improvements

Slide #7





FY20 Street Rehabilitation and Construction

- ✓ Stanton Road
- ✓ Hedrick Street
- ✓ Mashburn Avenue
- ✓ Professional Park Drive
- ✓ Jefferson Street
- ✓ Eastern Avenue
- ✓ Ricks Avenue
- ✓ Sherwood Boulevard
- ✓ Live Oak Street 100 Block
- ✓ Gordon Street
- ✓ Laurel Lane
- ✓ Safrit Drive
- ✓ Craven Avenue
- ✓ Carteret Avenue
- ✓ Pollock Street
- ✓ Olivia Road
- ✓ Live Oak Street 300 Block
- ✓ Taylors Creek Road
- ✓ Campen Road

Final Inspection & Punch List

Slide #8





FY20 Street Rehabilitation and Construction

Concrete Work

- ✓ Replace **467 feet** of rolled curb
- ✓ Replace **82 feet** of curb & gutter Complete
- ✓ Replace **69 sq. yards** of sidewalk
- ✓ Replace **16 each** concrete curb ramps Complete

Pavement Markings

- ✓ **75 feet** of 4" wide white lines Complete
- ✓ **1,078 feet** of 4" wide yellow lines Complete
- • **387 feet** of 24" wide crosswalk lines 231 feet complete

Seal Coating

- • Marsh Street, Broad to Mulberry — Awaiting warmer temperatures

Slide #9

FY20 Street Rehabilitation and Construction

Orange Street

- • Utilities in place
  - – Water line tested & disinfected
  - – Gravity sewer tested
- • Road base in place
- • Pervious concrete in place
- • To do
  - – Switchover water services
  - – Place asphalt surface course



Slide #10

FY20 Street Rehabilitation and Construction

New Street Construction

✓ Howard Jr. Lane

- Souza Development Access Street
  - Paused
  - Stormwater Permitting



Unchanged

Slide #11

Turner Street 100 Block Street Improvements (West Side)

- Work Underway
  - Utilities Relocated
  - Retaining Wall Construction In Progress
- April 30th Milestone
  - Complete Front Street to FishTowne Brew House



Slide #12

Cedar Street Utility Rehabilitation & Replacements

- Work continues
  - Water @ 95 percent
  - Sewer @ 30 percent
- May 3rd Completion (Schedule)
  - ≈ 1 week behind



Slide #13

Active Projects

(8 through 13)

- Wastewater Asset Inventory Assessment
- High-Rate Infiltration System Permit Requisition
- **ECHS Sewer Pumping Issue Investigation**
- Meeting Street Drainage Improvements
- **Charles Street Area Drainage Improvements/Maintenance**
- ✓ Town Hall Reception Area Renovation
- Town Hall Entrance Improvements

Slide #14

Active Projects

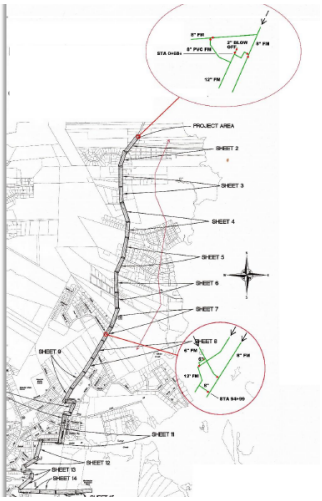
(8 through 13)

- Wastewater Asset Inventory Assessment
- High-Rate Infiltration System Permit Requisition
- **ECHS Sewer Pumping Issue Investigation**
- Meeting Street Drainage Improvements
- **Charles Street Area Drainage Improvements/Maintenance**
- ✓ Town Hall Reception Area Renovation
- Town Hall Entrance Improvements
- Wastewater Treatment Plant Odor Control System

Slide #15

ECHS SEWER PUMPING INVESTIGATION

- ECHS Pumps unable to discharge
- Multiple Month Issue
- School's efforts
  - "Pigging" of force main
  - Search for trapped air



1 Slide #16

ECHS SEWER PUMPING INVESTIGATION

Town's efforts

- Correlating 3 sets of historical drawings
- Searching for trapped air
- Checking & flushing Town air release valves
- Checking valves for open-closed status
- Looking for buried valves

VIDEO

2
3
4 Slide #17

Charles Street Area Drainage Improvements/Maintenance

- Charles Street drainage issues
- Possible downstream pipe joint failures
- To do
  - Obtain temporary access agreements
  - Grading
  - Pipe flushing
  - Pipe joint repairs

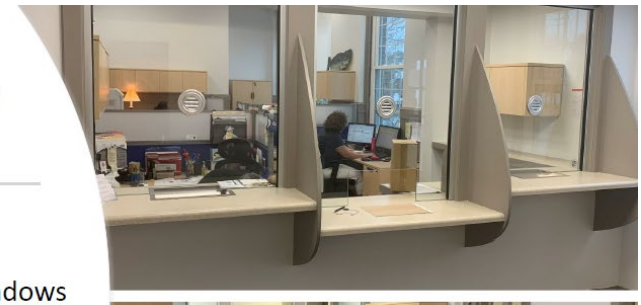


5
6
7 Slide #18

Town Hall Reception Area Renovation

- Changed out transaction windows

⇒ Complete





8

Slide #19





Town Hall
Steps, ADA Ramp
& Sidewalks

- Sidewalk
- Rails
  - Delayed
- Cleanup & Restoration

Slide #20

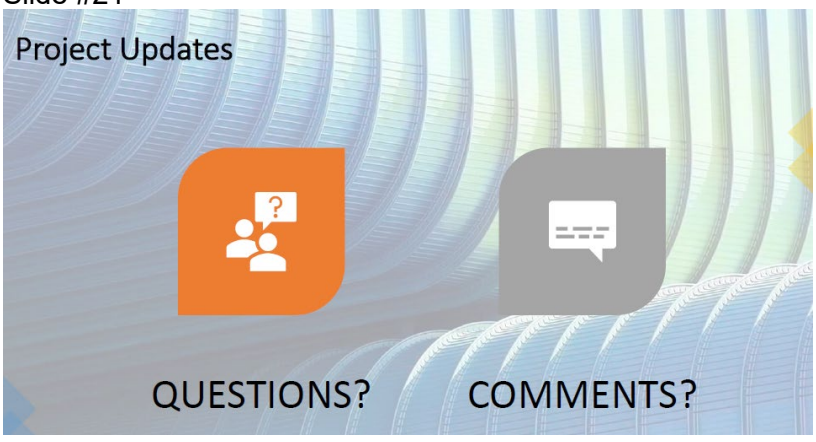
Wastewater Treatment Plant Odor Control Unit

Complete!





Slide #21



Commissioner Harker asked if staff was noticing any difference in the odor control now that this was in place.

Town Engineer Meshaw said he believed so. He said staff didn't leave it running the first week and there were a number of complaints from residents in Beau-Coast. He said now the equipment was running over the weekend and staff had received no other complaints to his knowledge.

Commissioner Harker asked if it was loud and noisy.

Greg Meshaw said no, it was very quiet.

Mayor Pro-Tempore McDonald asked how long the Wastewater Treatment Plant Odor Control project had been completed.

Greg Meshaw said approximately two to three weeks.

Commissioner Hagle said the report was comprehensive and he appreciated the run through. He asked if the air release valves were on a regular maintenance or inspection schedule.

Greg Meshaw said yes, staff would be popping the top on the manholes and inspecting them regularly. He said the valves do exhaust a little wastewater into the manholes and that was normal.

Commissioner Hagle said a maintenance program was needed.

Greg Meshaw said he agreed as they were notorious for having issues.

[ITEMS FOR DISCUSSION AND CONSIDERATION]

1. USDA Financing Package – Formal Offer and Acceptance

The Board discussed the formal offer and conditions from USDA Rural Development Office for an infrastructure financing package totaling $23,579,000.

John Day, Town Manager, presented the following information:

BACKGROUND:

On March 1, 2020, the Board of Commissioners voted unanimously to accept a preliminary offer from USDA/Rural Development of an infrastructure financing package totaling $23,579,000.

The package is broken down as follows:

Project	Type Loans	Grants	Total
Sewer	$ 7,036,000	$ 5,005,000	$ 12,041,000
Water	$ 8,031,000	$ -	$ 8,031,000
Storm Water	$ 3,007,000	$ 500,000	$ 3,507,000
Total	$ 18,074,000	$ 5,505,000	$ 23,579,000

The formal "offer and conditions" letter (attached) from USDA/Rural Development has been received and a vote of acceptance is required to move forward.

Commissioner Carter said in reading through the materials it stated the government may come back at a later date and suggested the Town could proceed with a different lender if they could get comparable rates. She asked if this has ever happened.

Manager Day said no, not that was aware of because no one offers comparable rates.

Commissioner Carter asked what government this document was referring to and if it was County or State.

Manager Day said it was likely boilerplate language that was included.

Commissioner Harker said the different programs presented a lot of contingencies. She asked if the construction monitoring would be done by staff or the contractor performing the work.

Manager Day said this would be done by a third party and Greg Meshaw may could speak more about this process when the next agenda item was presented.

Commissioner Harker said it appears the Town would have to go through the loans first before receiving the grants in the two areas the Town was eligible for grant funding. She asked if that was the standard procedure.

Manager Day said yes.

Commissioner Harker said the budget should be outlined to reflect when the loan funds are being depleted so the Board would be aware when the grant funding would start.

Manager Day said there was considerable reporting to the USDA and the Board would be apprised of the progress of each project.

Commissioner Harker asked if all of the numbers within the formal offer documents had been checked and the language appears consistent.

Manager Day said the documents were prepared by the consultants.

Commissioner Harker asked if the funding would be applied after the project was completed.

Manager Day said that was correct. He said this was a standard procedure from USDA and it was customary of the project to be completed prior to USDA awarding any funds. He said the wording name was “USDA interim loans” and this process was very common.

Commissioner Harker said under the water collection system there was a short-lived asset reserves in the amount of $92,491. She asked if there was requirement to show that specific amount in the reserves.

Manager Day said it was required to be aside 10 percent of the loan payments each year and it was for a five-year period. He said the Town would setup something similar to an escrow account.

Commissioner Harker asked if the loan would be affected if the Board chose to change the fee schedule, either by an increase or a decrease.

Manager Day said he didn’t expect this to have a major impact on the water loan, however one of the qualifications of the program was because of the current sewer rate. He said if the sewer rate was to change substantially then the Town would no longer qualify for the grant and there would not be adequate funds to pay the existing bills.

Mayor Pro-Tempore McDonald asked if there could be more specificity given on the geographic areas the USDA funding and corresponding projects would be applied to.

Manager Day said Town Engineer Greg Meshaw presented a number of slides at the Retreat which outlined theses areas and there not been any changes since then. He said the engineering contracts were the next item on the agenda and the areas would be identified in those documents.

Commissioner Hollinshed said she was primarily interested in the start-up money the Town would need to put forward and wanted to ensure these funds would be reimbursed.

Commissioner Hagle asked how long the front money period would last.

Manager Day asked for clarification on whether Commissioner Hagle’s question was directed to the amount for construction or design.

Commissioner Hagle said he was referring to the anticipation loan.

Manager Day said this was not anticipated until 2023.

Mayor Pro-Tempore McDonald asked if the current changes at the federal government level, related to infrastructure, would have an impact on the Town recuperating some of it’s money towards any of our current projects similar to this proposal.

Manager Day said he didn’t think their would be any impact, but the discussion the Board had at the retreat may allow for some of those funds to be applied to other projects like

the water treatment plant. He said staff had been in touch with consulting engineers about beginning that effort. He said street resurfacing may be another option from the funds with the federal government.

A motion was made by Commissioner Hagle to approve the resolution accepting the conditions in the Letters of Conditions from USDA, Rural Development.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

Resolution of the Town of Beaufort
Accepting the Conditions in the
Letters of Conditions From USDA, Rural Development

BE IT RESOLVED

That the **Town of Beaufort** accepts the conditions set forth in a Letter of Conditions for Wastewater Collection, Storm Drainage, and Water Distribution Projects, and RUS BULLETIN 1780-27, Loan Resolution (Public Body)

That the Mayor and Town Clerk be authorized to execute all forms necessary to obtain a loan and grant from USDA, Rural Development, including, but not limited to the following forms:

Form RD 1942-46	Letter of Intent to Meet Conditions
RUS Bulletin 1780-27	Loan Resolution (Public Body)
RUS Bulletin 1780-12	Water or Waste System Grant Agreement
Form RD 1940-1	Request for Obligation of Funds

That if the interest rate charged by Rural Development should change between this date and the date of actual approval, the Mayor and Town Clerk be authorized to execute new forms reflecting the current interest rate and revised payments as required by Rural Development.

That the Board of Commissioners elects to have the interest charged by Rural Development to be the lower of the rate in effect at either the time of loan approval or loan closing.

This resolution also covers the adoption of the Mitigation Measures that were included in the Letters of Conditions. The Mitigation Measures will be in effect for the project area.

This resolution is to become a part of the official minutes of the Board meeting held on **March 22, 2021**.

MOTION MADE BY: Hagle

SECONDED BY : n/a

TO ADOPT THE RESOLUTION.

MOTION PASSED 5 to 0.

By: _____
Everette S. "Rhett" Newton, Mayor

Attest: _____
Allen Coleman, Town Clerk

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2. USDA Funded Utilities Project – Engineering Consultant Contracts and Budget Amendment

The Board considered voting to approve three (3) Engineering Service Agreements related to the Water, Sewer, and Stormwater Utility Improvements Projects funded by the USDA, and authorize the Town Manger to execute the Agreements. In addition, the Board considered approving a Budget Amendment transferring funds necessary to underwrite consulting engineer services from capital reserves to project accounts established by the budget amendment.

Greg Meshaw, Town Engineer, presented the following information:

BACKGROUND:

The Town of Beaufort has received word from the North Carolina State Rural Development Office of the United States Department of Agriculture (USDA) that it will provide funding for the Town's proposed water, sewer and storm water improvements projects. USDA representatives have also requested that fully executed Engineering Service Agreements (ESAs) for the three projects be submitted for their concurrence after the funds have been formally obligated by their agency. Accordingly, Town staff asks the Board of Commissioners to consider authorizing the Town Manager to execute the three ESAs. To that end, a copy of each agreement is attached for review.

Each ESA was prepared utilizing the template documents approved by USDA for use with projects the agency funds. The resulting documents were then reviewed by the USDA State Engineer. The documents were, thereafter, refined to incorporate revisions intended to address the Engineer's review comments. They are now attached for Board review.

Town staff also recommends that the Board authorize the appropriation of the internal funds necessary to underwrite the cost of consulting engineering services for the three improvements projects in conjunction with an approval of the ESAs.

Commissioner Carter asked if the funds associated would be reimbursed once the Town received the loan or the grant.

Greg Meshaw said yes.

Commissioner Hagle said there were essentially two parts, one being the basic expenditure portion for design and another for a resident project observer that would be performed by Rivers and Associates.

Greg Meshaw said this was for full-time on-site inspections. He said the resident observer was basically the eyes and ears of the engineer who designed the project so that at the end of the project the design engineer can certify to the State of North Carolina the work associated with the project was done in accordance with the plans and specifications.

Commissioner Hagle asked if those funds represented the $985,000.

Greg Meshaw said yes.

Commissioner Carter asked if the Town would be required to provide housing to this individual.

Greg Meshaw said that was some of the cost but primarily it was for travel.

A motion was made by Commissioner Hagle to:

a. Approve the engineering services agreements for the USDA-funded water, sewer, and storm water improvement projects,
b. Authorize the Town Manager to execute the agreements and;

c. Approve the budget amendment transferring the funds necessary to underwrite the consulting engineer services from capital reserves to project accounts established by the budge amendment.

Mayor Newton reminded the Board the motion was for multiple parts.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

3. Request to Rezone 1001 Cedar Street from R-8 to CS-MU – Case No. 21-02

The Board considered voting to approve a request to rezone 1001 Cedar Street from R-8 Residential to CS-MU Cedar Street Mixed Use District.

Kate Allen, Town Planner, presented the following information:

BACKGROUND:

The Board of Commissioners conducted a public hearing at the March 8th Regular Meeting. Public comments were accepted for 24-hours following the hearing; there were none.

Property owner, Bradley Cummins, is requesting to rezone 1001 Cedar Street from R-8 Residential to CS-MU Cedar Street Mixed Use District.

The Planning Board reviewed the request at the February 15, 2021 meeting and found the request consistent with the CAMA Future Land Use Map. 5/5 members in attendance unanimously recommended approval of the request.

Commissioner Carter asked if there were any objections to the rezoning request.
Kate Allen said there was no feedback received after the public hearing.
Commissioner Hagle said the expansion on Cedar Street mixed use into the next block, which is primarily residential, if from a planning standpoint that was permissible.
Kate Allen said Kyle Garner and her thought the rezoning was reasonable considering the growth patterns for this area. She said the area in question served as a nice buffer between residential and commercial use.

A motion was made by Commissioner Hollinshed to approve the request to rezone 1001 Cedar Street from R-8 to CS-MU; Cedar Street Mixed Use.

Commissioner Hollinshed read the following consistency statement and ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE 1001 CEDAR STREET FROM R-8 to CS-MU
ORDINANCE NO. 21-05

Applicant:	Bradley Cummins
Location:	1001 Cedar Street
Parcel ID:	730618404112000
Lot Size:	0.24 acres
Existing District:	R-8 Residential District
Meeting Date:	March 8, 2021
Requested District:	CS-MU Cedar Street Mixed Use District

WHEREAS, the Applicant has submitted a request to rezone the above referenced property to CS-MU; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on February 15, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on March 8, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, at the March 22, 2021 meeting the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of CS-MU is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan - Future Land Use Map.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 1001 Cedar Street to CS-MU Cedar Street Mixed Use District is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner Hollinshed and carried on a vote of 5 in favor and 0 against.

This, the 22nd day of March, 2021

TOWN OF BEAUFORT

Everette (Rett) Newton, Mayor

Allen Coleman, Town Clerk

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Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

4. Request to Rezone 502 Cedar Street from TR to CS-MU; Case No. 21-03

The Board considered a rezoning request to add continuity to the 500 block of Cedar Street regarding the zoning of Mixed Use.

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:

At the March 8th Commissioners a public hearing was conducted via zoom, however a decision was not made due to the requirement to wait 24 hours for written comments. The request is that the Commissioners make a decision to approve or deny the request and provide a consistency statement.

At the January 19th meeting the Planning Board requested that staff submit a rezoning request for this parcel to add continuity to the 500 block of Cedar Street regarding the zoning of Mixed Use. Per the Boards request staff is submitting 502 Cedar Street for rezoning from TR to CSMU.

At their February 15, 2021 meeting the Planning Board recommended unanimously to rezone 502 Cedar Street from TR to CS-MU.

Director Garner said to follow-up on Commissioner Hagle's question on the last item, he would echo agreed with Kate Allen that the pattern is fine. He said it will be interesting to see if it stays consistent in the CAMA Land Use Plan that was currently be updated.

A motion was made by Commissioner Hagle to approve the request to rezone 502 Cedar Street from TR to CS-MU.

Commissioner Hagle read the following consistency statement and ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE ~~508 & 510~~ Cedar Street FROM TR to CS-MU
ORDINANCE NO. 21-06

(A) 502

Applicant:	Town of Beaufort Staff
Location:	502 Cedar Street
Parcel ID:	730618215164000
Lot Size:	15,143 Sq. ft. Total (based on GIS data)
Existing District:	TR (Transitional)
Meeting Date:	March 8, 2021
Requested District:	CS-MU – Cedar Street – Mixed Use

WHEREAS, the Town of Beaufort Planning Staff has submitted a request to rezone the above referenced property to CS-MU; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on February 15, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on March 8, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of CS-MU is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 502 Cedar Street to CS-MU is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner Hagle and carried on a vote of 5 in favor and 0 against.

This, the th day of March 2021

TOWN OF BEAUFORT

Everette (Rett) Newton, Mayor

Allen Coleman, Town Clerk

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Attachment - F

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Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

5. Request to Rezone 823 West Beaufort Road from R-8 to B-1; Case No. 21-04

The Board considered a request to rezone 823 West Beaufort Road from R-8 residential to B-1 General Business District.

Kate Allen, Town Planner, presented the following information:

BACKGROUND:

The Board of Commissioners conducted a public hearing at the March 8th Regular Meeting. Public comments were accepted for 24-hours following the hearing; there were none.

Janine Facciola is requesting to rezone 823 West Beaufort Road from R-8 Residential to B-1 General Business District.

The Planning Board reviewed the request at the February 15, 2021 meeting and found the request consistent with the CAMA Future Land Use Map. 5/5 members present unanimously recommended approval of the request.

A motion was made by Commissioner Hollinshed to approve the rezoning request of 823 West Beaufort Road from R-8 residential to B-1 General Business District.

Commissioner Hollinshed read the following consistency statement and ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE 823 WEST BEAUFORT ROAD FROM R-8 to B-1
ORDINANCE NO. 21-07

Applicant:	Janine Facciola
Location:	823 West Beaufort Road
Parcel ID:	730615634587000
Lot Size:	0.474 acres
Existing District:	R-8 Residential District
Meeting Date:	March 8, 2021
Requested District:	B-1 General Business District

WHEREAS, the Applicant has submitted a request to rezone the above referenced property to B-1; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on February 15, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on March 8, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, at the March 22, 2021 meeting the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of B-1 is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan - Future Land Use Map.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 823 West Beaufort Road to B-1 General Business District is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner Hollinshed and carried on a vote of 5 in favor and 0 against.

This, the 22nd day of March, 2021

TOWN OF BEAUFORT

Everette (Rett) Newton, Mayor

Allen Coleman, Town Clerk

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Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

6. Text Amendment modifying the Land Development Ordinance Section 20: Special Use Permits; Case No. 21-05

The Board discussed and considered a staff initiated text amendment modification proposal to replace the term "public hearing" with "quasi-judicial proceeding" in order to eliminate confusion between the legislative and quasi-judicial processes.

Kate Allen, Town Planner, presented the following information:

BACKGROUND:

Section 20: Special Use Permits, of the Land Development Ordinance, currently uses the language "public hearing." Staff is requesting the term "public hearing" be changed to "quasi-judicial proceeding" in order to eliminate confusion between the legislative and quasi-judicial processes. Staff has consulted with the Town Attorney to ensure the request is consistent with the North Carolina General Statutes.

Commissioner Harker asked for additional clarification on what exactly was confusing.

Kate Allen said the current ordinance was written with the term public hearing leading staff to believe the 24-hour period comment period was applicable to special use permit applications.

Commissioner Harker said not only does this change the term but also the process.

Kate Allen said that was correct. She said with a quasi-judicial proceeding the Board could render a decision at the same time and would not have to wait a 24-hour comment period.

Commissioner Harker asked if the public would have the opportunity to comment at any point during this process.

Kate Allen said during a quasi-judicial proceeding only individuals with standing are eligible to comment and must be subscribed an oath prior to giving testimony. She said on text amendments any member of the public could comment but with special use permits only individuals with standing would be eligible to comment.

Commissioner Hollinshed said replacing the language will clean things up a bit and create less confusion in the future.

Commissioner Hagle said this process change will make things a lot easier and stream decisions.

A motion was made by Commissioner Hagle to schedule a public hearing for April 12, 2021, the next Board of Commissioners regular meeting, and consider the text amendment modification at that time.

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

7. Modify/Revise the Existing Planned Unit Development (PUD) for Beau Coast Subdivision

The Board considered the applicant-initiated request to modify several standards in the PUD Booklet Dated February 22, 2021 for Beau-Coast Subdivision.

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:
The applicant wishes to modify the following standards in the PUD Booklet Dated February 22, 2021 for Beau Coast Subdivision:

- Convert a section of eight (8) 22' wide townhome lots (existing lots 119-126) to four (4) single family lots (50' wide): Net loss of four (4) dwelling units; (See Attachment – A – Vicinity Map for location of lots.)
- Convert two (2) 20 foot wide townhome lots (lots 177 & 178) to one (1) 40' wide single family lot: Net loss of one (1) dwelling unit; o Total net loss of 5 dwelling units. (See Attachment – A – Vicinity Map for location of lots.)
- Add permeable pavement specifications to the PUD document for alleys, on-street parking areas, and sidewalks as an option for use in the PUD;
- Add note regarding lot configuration options

At their March 15, 2021 meeting, the Planning Board unanimously recommended to Modify the PUD for Beau Coast Subdivision with the above four revisions.

Director Garner said the Town Clerk had proposed a change in process for the public hearing items. He said instead of the Board receiving these items multiple times, the Board could vote on the proposal after the public hearing and place a contingency pending any written public comments. He said if written comments were received the Board would default to hearing those comments at the next work session.

Mayor Newton asked if this change had been vetted through the Town's Attorney.

Director Garner said yes.

A motion was made by Commissioner Hagle to schedule a public hearing for April 12, 2021, the next Board of Commissioners regular meeting, and consider the modification request at that time.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

8. Final Plat – Beau Coast Phase V
The Board discussed an applicant-initiated request to subdivide a 15.31-acre tract into 86 lots (49 Single Family Residential Lots and 37 Townhome Lots).

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:
The applicant wishes to subdivide a 15.31 acre tract into 86 lots (49 Single-Family Residential Lots & 37 Townhome Lots). In addition to Planning Staff, the Town Engineer and applicants Engineer will also be available to answer questions regarding the proposed infrastructure.

At their March 15, 2021, meeting, the Planning Board recommended unanimously to approve the Final Plat.

A motion was made by Commissioner Carter to consider this request at the April 12, 2021 Board of Commissioners Regular Meeting and place this item under discussion.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

9. Preliminary Plat – Beaufort East Village Phase 1 – Case No. 21-08

The Board discussed an applicant-initiated request to subdivide a 41.79-acre tract into 108 lots (60 Single-Family Residential Lots and 48 Townhome Lots).

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:

The applicant wishes to subdivide a 41.79 Acre Tract into 108 Lots (60 Single-Family & 48 Townhouses). In addition to Planning Staff, the Town Engineer and applicants Engineer will also be available to answer questions regarding the proposed infrastructure.

At their March 15, 2021 meeting, the Planning Board recommended unanimously to approve the Preliminary Plat.

A motion was made by Commissioner Carter to consider this request at the April 12, 2021 Board of Commissioners Regular Meeting and place this item under discussion.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

10. Rotary Beaufort Historic Road Race

The Board considered an event application submitted by the Beaufort Ole Towne Rotary for the Historic Beaufort Road Race.

Rachel Johnson, Parks and Events Coordinator and Public Information Officer, presented the following information:

BACKGROUND:

Event organizers for the Historic Beaufort Road Race run by the Beaufort Ole Towne Rotary have submitted an event application to host the annual event on Saturday, June 12 2021. This is a change for the event that has traditionally been held in late July.

In addition to their event application, attached is the organizations' COVID-19 safety procedures.

The event requests the closure of the West parking lot. Staff has reviewed the application and raises the concern of a potential conflict if the closure of the West Parking Lot is approved. June 12 is the Big Rock fishing tournament's KWLA fishing tournament for lady anglers as such the parking area is often filled with participants at an early hour.

Organizers have also requested assistance with the fees associated with the event as outlined below.
* June 12, 2021

* Set-up 6 a.m. - Finished by 10 a.m.
* Request traditional 10K route
* Request Turner Street be closed from Middle Lane to Front Street from 6 -10 a.m.
* Request Front Street be closed from Orange to Queen Streets during race
* Request closure of the West Parking lot to reopen by 10 a.m.
* Request paid parking be suspended until 10:30 a.m.
* Event will provide volunteers to help supplement public safety personnel at intersections along Front Street
* Request assistance with fees. Traditionally they have received an event grant from the Town. This funding is unavailable for the 2021 event season due to the lack of a parking season in 2020. Fees incurred will come from closure of the West Parking lot during Paid Parking season, police/fire personnel to close streets and safety and trash/recycling services. The estimated total based on past years is around $450 without parking lot closure fees.

Rachel Johnson said the application request inadvertently said the west parking lot, but it was John Newton Park. She said this would clarify any confusion around parking.

Commissioner Harker said the COVID-19 safety procedures included in the event application were presented well.

A motion was made by Commissioner Hagle to approve the event application request submitted by the Beaufort Ole Towne Rotary for the Historic Beaufort Road Race on Saturday, June 12, 2021.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

11. Residential Solid Waste Fee Increase

The Board discussed a 27-cents per month increase in the Residential Solid Waste Fee; (from $19.17 to $19.44).

Christi Wood, Finance Director, presented the following information:

BACKGROUND:

Per our residential service agreement with Waste Industries (now GFL), the monthly fee shall be adjusted on an annual basis to reflect the annual adjustment based on the Consumer Price Index for All Urban Consumers (CPI-U): South Region, as published by the US Department of Labor. Effective April 1, 2021, the rates will be increased by 1.4% for residential services. The notice from GFL is attached.

The term of the contract for Residential Service with GFI is 7 years: March 2017-February 2024. It can be extended for an additional 5 years. This contract was executed in November, 2016.

The term for the contract for WBD Service with GFI is also 7 years: July 2017 – June 2024. It can be extended for an additional 5 years. This contract was executed July, 2017.

A motion was made by Commissioner Hagle to include this item under consent for the April 12, 2021 Board of Commissioners Regular Meeting.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

12. FY 2021 Budget Amendment No. 8

The Board considered a budget, grant, and capital project ordinance amendment for fiscal year 2020-21, which appropriates $6,500 of General Fund balance to purchase a new HVAC unit for the Public Works Wood Shop.

Christi Wood, Finance Director, presented the following information:

BACKGROUND:

This amendment requests a Fund Balance appropriation for a new HVAC unit for the Public Works Wood Shop. The current unit is 22 years old and has stopped working due to a rusted accumulator. A repair has been quoted for $2,000 but will still leave a 22-year-old unit. The cost for a new unit is $6,500.

Commissioner Carter asked if an investigation had been conducted because the cost seemed high.

Director Wood said the Town was required to have three quotes and all of the quotes were around the same price point.

A motion was made by Commissioner Harker to include this item under consent for the April 12, 2021 Board of Commissioners Regular Meeting.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

13. February 2021 Financial Report-Notes

The Board received the Town's February 2021 Financial Report and Notes.

Christi Wood, Finance Director, presented the following information:

BACKGROUND:

Tax collections for January and February are listed below

January		
Tax Year	Balance Remaining	Collection Rate to Date
2014	$2,400	99.91%
2015	$7,614	99.70%
2016	$18,519	99.30%
2017	$21,944	99.25%
2018	$29,954	99.08%
2019	$65,549	98.29%
2020	$194,294	95.94%
February		

Tax Year	Balance Remaining	Collection Rate to Date
2014	$2,400	99.91%
2015	$7,267	99.72%
2016	$16,674	99.37%
2017	$21,834	99.26%
2018	$28,834	99.12%
2019	$60,221	98.43%
2020	$150,799	96.85%

- Sales and Use tax distribution for March is $177,189 (December sales)

Commissioner Carter asked if every employee was covered under Worker's Compensation because some departments showed an account and others did not.

Director Wood said some departments are lumped together.

Commissioner Hagle said the income from property tax and sales tax was coming in over projection. He asked if this was a trend and what the forecasted amounts were through the end of the fiscal year.

Director Wood said the actuals were coming in a little higher than projection. She said the property tax collections had likely reached a peak for this fiscal year and the Board would start to see a steady decline until the end of the fiscal year.

Commissioner Hagle asked how much of a decrease could be expected.

Director Wood said she could run a few reports and analysis and send those projections out to the Board for their review.

Commissioner Hagle said that would be helpful and if a projection for sales tax could be included as well.

Manager Day said the Board had talked about Sales Tax Revenue and the potential for it to diminish as the year continued but that declined hasn't happened yet.

14. Beaufort Harbor and Waterways Master Plan Advisory Committee

The Board discussed the charge and composition for the proposed Beaufort Harbor and Waterways Master Plan Advisory Committee.

John Day, Town Manager, presented the following information:

BACKGROUND:

As discussed at the February 2020 Town Board retreat, a comprehensive harbor and waterways master plan is needed to address water quality, harbor management, the expiration of the current Beaufort Docks and National Park Service leases in 2024, the possible development of a mooring field, and how such items impact the timing of the replacement of the Front Street bulkhead and boardwalk.

At this year's Town Board retreat it was decided that an advisory committee should be appointed to assist in the effort. This committee will engage the public and work with the town's staff and consultant to advise the Board of Commissioners during the formation of a Beaufort Harbor & Waterways Master Plan.

The Board also discussed preparation of an updated application for appointments to boards

and committees, including a question related to applicants' "connection" to Beaufort. There was consensus that there should not be a residency requirement for all appointees to this committee, and that there should be full disclosure of any potential financial implications for members.

A draft description of the committee background, charge, and composition is attached. Also, a draft application for boards and commissions will be introduced at the meeting.

Commissioner Carter said the Board had originally requested that the new committee be comprised of six members and each member of the Board would be eligible to appoint one individual. She said she objected to the current proposal which allowed the Mayor to select two individuals.

Commissioner Carter said water quality was listed as the primary element of this committee and this was not a concept a small group would be able to deal with.

Commissioner Harker said the Board had originally agreed to having a smaller group and was not opposed to having individual appointments. She said the understanding was applications would be received similar to any other appointment vacancy and the Board would work through those together to ensure good representation was on the committee. She asked if the committee members would serve a number of terms before having to be re-appointed or rolling off.

Manager Day said this decision was up to the Board but it may be beneficial to have the committee members serve for the duration of the project but the consultant may need to weigh in on this as well. He said the Board had discussed having five, six, and even seven members on this committee and this was a decision for the Board.

Mayor Pro-Tempore McDonald said he didn't have an issue with the number of positions on this committee but expected the individuals that were appointed to be just, fair, and work for the betterment of the Town of Beaufort.

Commissioner Hollinshed said based on her recollection the Board had discussed having five members, each appointed by a Commissioner, and a sixth member being appointed by the Mayor. She said if the Board wanted seven positions then that position could be an at-large and nominated by the entire Board.

Commissioner Hollinshed said that the money was in hand to hire Moffat and Nichols.

Mayor Newton asked if the Board wanted to bring Moffit and Nichols on board first before a definition was placed on the new advisory committee.

Commissioner Hollinshed said the stakeholder group and the consultant need to sit down at the same time together, equally.

Commissioner Hagle said appointments should be handled the same way the Town advertises and recruits for other positions. He said the Board should appoint all six positions or however many positions is designated.

Commissioner Carter said the Board would select the members from the applicant pool but in this case a certain applicant was preferred.

Commissioner Hagle said individuals throughout the community could be encouraged to apply but the process needed to stay the same.

Commissioner Harker said the emphasis would be on the new application and how the questions would be worded.

Commissioner Carter said the consultant really needed to get their feet wet before the committee was appointed.

Commissioner Hagle said consultant was very skilled in this type of work and should come at the same time as the committee members so everyone was starting from the same point.

Commissioner Carter said their were concerns about the consultant starting first and making decisions before the Committee was appointed.

Commissioner Hollinshed said that wasn't the intention and decisions would not be made before the committee was seated. She said bringing the consultants on board first would allow them time to prepare for the committee meetings.

Commissioner Carter said as long as the consultants are advisory and not making decisions then she supported bringing them on now.

Mayor Newton asked if it was possible to bring the consultants on and have them at the April 12, 2021 BOC regular meeting.

Manager Day said the Board did not need to approve a contract with Moffat and Nichols as this would be done in-house. He said the consultants were aware of this project and were on hold pending the Boards decision on timing. He said staff would begin the contractual process and routing through the attorney.

Manager Day said the Board had tossed around the idea of having six positions and possibly the Mayor being able to bring forward a name for appointment to the new committee. He said the Board also discussed having the option for applicants to follow the regular appointment process and clarification needed to be given.

Commissioner Hagle said the applicants should follow the normal appointment process.

Commissioner Carter said that was fine but any of the Commissioners could appoint someone as long as the individual was willing to serve.

Commissioner Hagle said the individual must apply and have an application on file.

Commissioner Hollinshed said it was up to the Commissioners to encourage qualified applicants to apply.

Commissioner Harker asked if the seventh member could be a tie-breaker appointment.

Commissioner Hollinshed said once the applications come in the Commissioners could chose to appoint additional members if a large pool of qualified applicants presented themselves.

Town Clerk Allen Coleman presented the Board of Commissioners with the new Volunteer Boards and Commissions application.

15. Manager and Board Evaluation Proposal

The Board reviewed and discussed the Town of Beaufort's Manager and Board Evaluation process proposal as recommended by the School of Government (SOG) at The University of North Carolina at Chapel Hill and provided direction to staff on next steps.

Commissioner Harker presented the following information:

BACKGROUND:

Donna Warner and Peg Carlson of the UNC School of Government worked with Commissioner Harker, Mayor Newton, and the Town Manager to develop a process for manager and board evaluation.

Donna Warner made a presentation at the December, 2020 Work Session explaining the proposed evaluation process. The presentation, proposal, and list of evaluation principles is attached.

Commissioner Carter said she completely disagreed with the proposal as it was presented. She said after attending the training at the School of Government the evaluation templates that were presented were very similar to those the Board has used in the past and

recommended the Board consider one of those as an option. She said the Manager evaluation templates from the City of Lexington as well as the Durham County Manager would be a good starting point. She said the school of government said each governing Board should think of themselves as a unit and not as individuals.

Commissioner Hagle said the form was important, but the process was key. He said evaluation discussions should be open and honest and anytime a group was evaluating one individual it could be challenging. He said the form would guide the discussion and help ensure transparency, solid expectations, and good results.

Mayor Pro-Tempore McDonald said the Board should operate as a group and share information, discuss items, and consider moving forward together. He said the course he attended did not reveal to him any difference procedures or processes than the Board was currently using and asked for clarification on what the intended outcome was from this discussion.

Commissioner Harker said the request was twofold. She said originally recommendation was for the Board to approve an evaluation process which would include an opportunity for the manager to provide a self-evaluation prior to the Board's input and this would be a change from the current setup. She said the second change was to consider the form that was used and allow the Manager an opportunity to provide feedback on the Board's performance.

Commissioner Harker said the City of Lexington's proposal may be an item for consideration but that information needed to be circulated to the entire Board. She said the process and timeline also needed to be determined and whether the Board would like for the evaluation and any type of merit raises to coincide with the fiscal year.

Commissioner Harker said the proposal still allowed for the Board to complete the evaluations individually and during a closed session discuss the individual reviews and compile those for a completed Manager evaluation from the Board as a group.

Commissioner Carter said the training revealed that merit raises and evaluations should not be tied together.

Commissioner Harker said it was unusual that the course did not say the two items could be completed at the same time because that differed from the conversations and training she and the Mayor had received from Peg Carlson and Donna Warner.

Mayor Pro-Tempore McDonald said he was from the old school and if the manager was not performing up to the appropriate standards then it should be discussed by the Board. He said communication was key and if the manager was not performing at the appropriate standards then their should be communication of specific examples throughout the year instead of waiting until the evaluation process. He said it would be helpful if the evaluation could include a spot for the Manager and the Board to set expectations on what each of them expected from each over in three years, five years, etc.

Commissioner Harker said that was the purpose of the form and it was critical to set expectations from the very beginning.

Mayor Pro-Tempore McDonald said out of the six members, including the Mayor, he was not aware of any conversation with the Town Manager where expectations were set and a thorough conversation around the Manager's job description was conducted. He said the Manager should have the opportunity to say whether he or she can perform certain elements of the job duties and what tools he or she may need to meet the expectations of the Board.

Commissioner Harker said Manager Day may want to elaborate on some of the points that had been raised so far.

Manager Day said the proposal did include a new form and the format was a little different but the process being recommended would include time for individual Commissioner reflection and then an opportunity for the Board to discuss their thoughts and comments as a group. He said the final rating would be done as an entire group at the facilitated evaluation session which was different than the current process.

Manager Day said the Board would need to reach a consensus or conclusion rather than just simply submitting their responses on a form.

Commissioner Hollinshed said the current proposal was not her favorite and that the Board should consider other forms that are a better fit for Beaufort. She said the Board of Commissioners answer to the people of Beaufort and are reviewed every four years at the time for elections. She said the emphasis should be on the Manager's ability to accomplish certain goals as designated by the Board and give him or her the tools to accomplish those goals. She said the Manager does not report to the people in the community unless the Board authorizes that relationship and their was to much emphasis on the monetary portion of the review.

Commissioner Hollinshed said it may be helpful and even needed to conduct two mini-reviews; one at the beginning of the fiscal year and a six month check in as this process unfolds. She said she liked the ideas that were presented by the School of Government and the Board could encompass some of those suggestions into their review process.

Commissioner Harker said the proposal that was currently presented outline several processes that could be considered as the Board worked to develop a unique process.

Commissioner Hollinshed said she disagreed with the proposal as written and said the training that was offered presented this information in a different light.

Mayor Newton said it was important that the Board operate by consensus verses giving individual goals and priorities preference. He said he agreed with Commissioner Hollinshed that it was important for the Board to clearly outline tangible goals and the process could be two mini-reviews. He said an informal session could be held in January and then a formal session in July or August to ensure the Manager was able to succeed with the Board's expectations.

Mayor Newton said the evaluation and merit raise conversations should be linked together but certainly the Board could hold two different discussions around the same time if that was the consensus by the Board.

Commissioner Hagle said the salary adjustment for the Manager should be made after the review and not discussed at the same time or the same meeting. He said it may be appropriate to review the merit raise discussion at the next closed session.

Commissioner Harker said there appeared to be consensus among the Board to go back to the drawing board and tweak the proposal to align more with what the Town of Beaufort needed.

Manager Day said he was interested to see the evaluation proposal from Durham County as that was what the School of Government used during their session as well.

Commissioner Carter said during the evaluation training several members agreed to using something similar to the Durham County's or the City of Lexington's proposals. She said Allen could send those documents to the entire Board so everyone could review those materials.

Town Clerk Allen Coleman said he would email the training materials that some of the Board members had received to the entire Board for their review.

Commissioner Harker said this meant the Board was going back to square one.

Commissioner Carter said the Board should be able to use one of the forms presented and go from there. She said the training encouraged the manager's evaluation and the Board evaluation be separate processes, but she did not see a need to evaluate the Board itself.

Commissioner Harker said the conversation about Board evaluation hit a high note with several members when this was presented in December of 2020.

Commissioner Hagle said the Board needed to review the various templates proposed so the Board could make a final decision at their next work session.

Commissioner Harker asked if the Board would like to consider a facilitator to help with the evaluation discussion.

Commissioner Carter said a facilitator was not needed as the Board was very compatible and respectful of others.

Commissioner Harker asked when the next work session was scheduled.
Town Clerk Allen Coleman said on April 26, 2021.

[MAYOR/COMMISSIONER COMMENTS]

Commissioner Carter said the Planning Board meeting was held and the Town's Attorney mentioned changes that would need to occur to mirror current legislative changes with 160-D. She asked if the Town was on track to having those in place by July.

Manager Day said yes, but the scope of the project was rather large and it would need to be out sourced.

Commissioner Hagle asked what the cost would be for the revision work.

Manager Day said one proposal was for $85,000 as this was not an inexpensive project.

Commissioner Hagle said the cost was excessive and a bit ridiculous from a tax payers perspective. He asked if the Town's Attorney could provide a reasoning behind why this was being done and the benefits of the changes.

Town Attorney Arey Grady said the end goal of the legislation would be good as the General Assembly really took all of the land use statutes applicable to counties and cities and consolidated them into one new chapter. He said the current Land Development Ordinance coupled with the new legislation in 160-D created a several hundred-page document for review.

Commissioner Hagle asked if the Land Development Ordinance would be compatible with the new legislation or if the Town would spend more money revising that document as well.

Attorney Grady said 160-D was geared to be primarily administrative regarding rules and regulations on permit issuance, violation enforcement, when to conduct a legislative or quasi-judicial proceeding, etc. He said the Land Development Ordinance would be more substance. He said the LDO and 160-D work addresses two different sides of the coin and while the work could be down simultaneously, it would likely be overwhelming.

Commissioner Harker said thank you to the staff for their hard work. She said there was a lot of traffic in downtown Beaufort on Front Street and she was excited to see things picking up in that area and hopefully that volume continued through the summer months.

Commissioner Harker said she appreciated everyone's input on the Board evaluation discussion and agreed that the Board should work together to reach a conclusion that worked for everyone.

Mayor Pro-Tempore McDonald said the citizens of Beaufort entrusted the Commissioners to make decisions in the best interest of the community. He said the Board evaluation process was cumbersome and it was time the Board work together and come to a conclusion.

Commissioner Hollinshed said the Board will likely come to a consensus must quicker than what may be expected. She said the Board had a lot of heavy items on their plate right now with the Harbor Committee, the Manger's evaluation, and the legislation requirements with 160-D.

Commissioner Hagle said there was a lot of thoughtful discussion today and everyone had been open and honest with one another. He said 160-D and the cost associated with those revisions was irritating and the General Assembly should work to make these types of revisions easier for small municipalities to maintain compliance.

Commissioner Hagle said the time had changed and may have some effect on peoples' sleep patterns. He said remember to drive defensively.

Mayor Newton said he appreciated the Boards ability to move through a very robust agenda with lots of good discussion.

[ADJOURN]

A motion was made by Commissioner Hagle to adjourn the meeting.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANIMOUS (5-0)

The meeting adjourned at 6:13 p.m.

_____
Everette “Rett” Newton
Mayor

_____
Allen Coleman
Town Clerk

DRAFT

MINUTES
TOWN OF BEAUFORT
BOARD OF COMMISSIONERS
VIRTUAL 2021 ANNUAL RETREAT – DAY 1
MARCH 11, 2021
2:00 P.M.

Due to the State of North Carolina's Declaration of Emergency in response to the COVID-19 pandemic and per NCGS § 166A-19.24, the Town of Beaufort Board of Commissioners conducted a remote meeting using the Zoom application. Members of the Board of Commissioners participated in the meeting remotely.

The Town of Beaufort Board of Commissioners met remotely for an annual retreat meeting on Thursday, March 11, 2021 at 2:00 p.m. with the following members present:

Mayor Everette Newton presiding
Mayor Pro Tempore Charles McDonald*
Commissioner Ann Carter
Commissioner John Hagle
Commissioner Sharon Harker
Commissioner Marianna Hollinshed

Others Present: Town Manager John Day and Town Clerk and Assistant to the Town Manager Allen Coleman (All other staff members will be identified appropriately below)

Mayor Newton called the meeting to order at 2:00 p.m., welcomed everyone in attendance, and asked Town Clerk Allen Coleman to call the roll.

Roll Call ensued.

Mayor Pro-Tempore McDonald experienced technical difficulties and joined the meeting at the noted time on page 2.

Mayor Newton reminded the Board that this session would be for open flow conversation and not as rigid as most of their other meetings were.

Manager Day said the materials that were presented and being used over the next two days were draft and preliminary look into the five-year plan and the over all budget. He said the final budget would not be presented for a couple of months and because the budget document includes several comprehensive plans such as the Annual Budget, Five Year Plan, and Capital Investment Plan it may be helpful to review these plans in depth so the Board can gain a better understanding of all the projects and programs included. He said the Budget document was the single most important document the Town has, and it should reflect the goals and priorities of the Board for the Town.

Manager Day said it would be helpful for each Commissioner to talk about their expectations of this years retreat and what they hoped to gain from the sessions over the next two days. He said the structure this year was partly based on a suggestion from Commissioner Hagle to spend more time reviewing the Capital Investment Plan and Five-Year Plan documents outside of the normal budget process.

[RETREAT GOALS AND AGENDA REVIEW]

Commissioner Hagle said the agenda was well thought out and he hoped the Board would have an opportunity to go through the Five-Year plan and Capital Investment Plan in depth to gain an understanding of what is included in these plans. He said the Board would need to review the current projects and see if there were any new projects that may need to be added. He said after the next two sessions he hoped the budget was 95 percent complete and the Board would not feel as rushed and pushed down the wire to approve the next budget.

Commissioner Hagle said the five-year plan Manager Day developed was an outstanding way to review financials because a single year goes by quickly and does not always allow for a comparison of actuals or a way to plan future expenses. He said the five-year plan provides a great opportunity to look ahead and adjust, so the Board was not surprised by any major expenditures.

Manager Day said without the five-year plan it would be extremely difficult to start a project similar to the USSI project or the USDA funded projects. He said those projects were complicated and span over multiple years that it would be difficult to make financially sound decisions without the planning stage offered by the five-year plan.

Commissioner Harker said the five-year plan was excellent. She said it is a great way to compile ideas and present those in an easy format for the citizens of Beaufort. She said the goal of the five-year plan was to provide a projection over future years to allow the Board an opportunity to review the needs of the Town. She said emergencies do happen so the Board has to be flexible but that was the beauty of a plan.

Manager Day said although some of the projects were labeled as new, the need was not new.

Commissioner Hollinshed said over the last few work sessions the Board considered taking on a considerable amount of debt and this would be a cause-and-effect equation. She said one goal should be to look at several scenarios regarding the added debt and to clearly know what projects or future items would be off the table if the Board voted in favor of the added debt. She said the utility fund should be another area the Board drilled into to learn more about but not specifically during the retreat sessions.

Commissioner Carter said the tremendous load of debt was a bit concerning and the effects of the five-year plan was something she was interested in learning more about. She said she would like to see how the additional revenue was being utilized since the tax rate recently changed. She said the five-year plan was a flexible document and with the significant changes to the debt service their may need to be changes in the five-year plan to accommodate the added expenditures.

Mayor Pro-Tempore McDonald joined the meeting at 2:08 p.m.

Mayor Newton said the five-year plan provided tremendous stability to the community and he liked the fact the Board was reviewing five-years at once verses single years. He said the Commissioners have taken on some very tough decisions to increase taxes and the invest was clear across the community. He said the only additional request for the Board to consider was a drinking water facility which was needed in the next 10 years.

Mayor Pro-Tempore McDonald said Beaufort was experiencing a lot of growing pains and there was no way to stop the rapidly growing needs of the community. He said it would be beneficial for the Board to review the current effects of the tax increase and how those additional funds were being spent across the entire community. He said the infrastructure projects were good, but the community needed to see tangible and visible items.

[ITEMS FOR DISCUSSION]

The Board received a presentation from the Town Manager on the Capital Investment Plan and associated projects.

1. Capital Investment Plan (CIP) Project Discussion and Review – using previously adopted CIP in the FY 2021 Budget

• Boardwalk / Bulkhead Improvements page 142

FY 2022 Budget

Boardwalk / Bulkhead Improvements



TYPE Capital Project
CATEGORY Culture & Recreation
STATUS Deferred
IDENTIFIED FY 2019
PROJECT COST $1,257,000
LIFE 30+ Years

CONTACT Greg Meshaw
DEPARTMENT PSA & Engineering

This project includes extensive repairs to the concrete bulkhead along Front Street between Turner and Queen Streets, as well as removal of the existing boardwalk and construction of a new one.

Background and Justification

The boardwalk is one of Beaufort's most important assets, and lies atop a bulkhead constructed in 1975. Structural engineers assessed the bulkhead's condition in 2018 and found it to be failing. The boardwalk, which is in need of replacement, must be removed to repair the bulkhead.

Status and Updates

In FY 2019, staff applied for a US Fish and Wildlife Service Boating Infrastructure Grant (BIG) which would have paid for about 50% of the project original project; it was not awarded.

As discussed at the February 2020 Town Board retreat, a comprehensive harbor and waterways master plan is needed to address water quality, harbor management, the expiration of the current Beaufort Docks and National Park Service leases in 2024, the possible development of a mooring field, and how such items impact the timing of the replacement of the Front Street bulkhead and boardwalk.

At the March 2021 Board retreat it was decided that an advisory committee should be appointed to assist in the effort. This committee will engage the public and work with the Town's staff and consultant to advise the Town Board of Commissioners during the formation of the Beaufort Harbor & Waterways Master Plan. The committee is expected to have its first meeting Summer 2021.

▸ Schedule, Cost, and Funding Estimates

The FY 2022 Harbor & Waterways Master Plan will affect the timing and design of this project, which could also have funding implications. The following cost estimates were developed in FY 2019, based on cost an estimate provided by a consulting engineer who was preparing the structural design for the project.

Manager Day said this item was discussed in greater detail during the last Board retreat and there were conversations around whether the Board wanted to establish a steering committee to oversee this project. He said the Beaufort Docks lease was set to expire in 2024 and the lease with the Park Service area at Town Hall was set to expire at the same time. He said the Board had previously discussed the possibility of mooring field and more discussion was needed on how this might settle into the future plans.

Manager Day said their would be considerable disruption along the docks when this project started and the Board may want to take time to think about how the new committee will work and function pre, during, and post project. He said the Board had designated funds to

contract with Moffit and Nichols, one of the better engineering firms, who had a great deal of experience in this type of work.

BOARDWALK/BULKHEAD IMPROVEMENTS

Updated for FY 2022

	COST ESTIMATES
Design, Permit & Bid	$ 35,000
Construction	1,222,000
Total Project Cost	$ 1,257,000

The following schedule is one option, which shows construction coinciding with the expiration of the Beaufort Docks lease in 2024.

BOARDWALK/BULKHEAD IMPROVEMENTS - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[CPF] Design, Permit & Bid	-	-	35,000	-	-	-	-
[CPF] Construction	-	-	-	1,222,000	-	-	-
Total Project Cost	$ -	$ -	$ 35,000	$ 1,222,000	$ -	$ -	$ -
PROJECT FUNDING							
[CRF] Boardwalk	-	-	35,000	565,000	-	-	-
[CRF] Intergovernmental	-	-	-	600,000	-	-	-
[GF] Property Taxes	-	-	-	57,000	-	-	-
Total Project Funding	$ -	$ -	$ 35,000	$ 1,222,000	$ -	$ -	$ -

Once this project is activated, a Boardwalk/Bulkhead Improvements capital project fund will be created to track all money associated with the project.

Money coming into the capital project fund includes:

- Transfer from Capital Reserve, contributed from General Fund in FY 2018 and FY 2019,
- Possible US Fish and Wildlife Service Boating Infrastructure Grant, and
- Property taxes and other General Fund revenues.

If the grant is not awarded, remaining funding may be provided through loan proceeds.

▸ Subsequent Impacts

There are no additional operating costs anticipated for this project once it is completed, aside from those already budgeted on an annual basis.

Commissioner Carter said her interest in this committee was great, but the scope of the project may need to be revised. She said the original project included repair work on the boardwalk and the bulkhead. She said the entire Harbor project could not be done at one time but rather the Board should consider the immediate needs which were the boardwalk and the bulkhead. She said the Harbor committee should focus on those two items sooner rather than later since the lease would expire or renew in 2024. She said a more extensive Harbor plan was needed but was not a priority in comparison to the other pressing issues.

Commissioner Hollinshed said the committee should have some representative from the downtown business owners since they would be the most affected during the work. She said Carolina Beach was closed for almost 2 years when they overhauled their harbor. She said the committee should be comprised of individuals from all across Town, but the scope of the project may need to be more clearly defined.

Commissioner Hollinshed said the project should be professionally managed and not by Town staff.

Commissioner Carter said municipalities have historically not done a good job at managing these types of projects.

Commissioner Hagle said the engineering firm, Moffat and Nichols, has a lot of experience in this kind of work. He said the question now should be if the Board wants to only fix what is broken or make a plan and look out ahead. He said he agreed with Commissioner Carter's comments and that it may be necessary to fix all of the issues.

Commissioner Hollinshed said the engineering firm was not going to focus on the impacts to the local merchants and that needed to be considered as the Board developed a plan to address all of the concerns.

Commissioner Carter said the process would be disruptive either way.

Commissioner Hagle asked if the Board wanted to receive input from the businesses downtown and make a plan for the disruption and focus primarily on the repairs.

Commissioner Carter said the scope of the project needed to be revised to a manageable size. She said downtown could not be closed for a year or two to complete the work and the project may need to be held over the half of two years particularly during off seasons. She said repairs are essential and the Board does not have an option in those.

Commissioner Harker said the downtown business owners definitely needed to be involved in the decision process. She said repairs are needed and if those are started and their may be a greater financial impact if the Board developed a harbor management committee afterwards. She said their were never enough funds to go around and this project was something the Board had discussed for several years.

Commissioner Hagle said the harbor plan would focus on adding a possible mooring field but the management of the docks should also be included in the harbor plan.

Commissioner Carter said repairs must be first.

Manager Day said these same issues were raised each year. He said many visitors come to Beaufort because it's scenic and they are able to walk along the Boardwalk, see the boats, shop, and dine at local restaurants. He said the impact to local business needed to be considered as well as the impact to the existing docks.

Manager Day said their was a lot of utility work to be done underneath the docks. He said the docks would be undergoing a great deal of transition in the next few years and it may be wise to plan the repair work around those changes. He said the Board may solicit for proposal from different companies on running and maintaining docks and if the selected company desires to rebuild or put in new infrastructure it may be wise to complete the repair work at the same time, in a coordination fashion.

Mayor Pro-Tempore McDonald said the Board is not aware of the exact repairs that are needed to the existing docks, but the heartbeat of Beaufort revolved around the Boardwalk and downtown area. He said the change of the Boardwalk would significantly impact the downtown area and the Board may need to research this further.

Commissioner Hagle said the Board needed to consult with Moffat and Nichols first to learn about the repair work and take time to engage the citizens. He said it made more sense to look at the repair work when the contract was up for renewal in 2024 so that it does not disrupt the Haywood and his business. He asked if waiting the additional years would change any of the current repairs.

Manager Day said no, the bulkhead was a slow deterioration and slow sinking. He said the primary reason for looking into this issue now was for the Boardwalk repairs. He said the Boardwalk needed repair as well as the Bulkhead and it didn't make sense to tear down the Boardwalk now and then have to tear it down again to fix or replace the Bulkhead in five years.

Commissioner Harker asked what the exact condition of the Boardwalk was.

Commissioner Carter said very bad.

Manager Day said staff continues to patch the Boardwalk, but he would hope the Board could have a plan for repair by 2024.

Commissioner Hagle said the applications for this committee should come through the normal appointment process but the Board members could ask individuals to apply.

Commissioner Carter said it ws important that the individuals have expertise in this type of work and have the time to dedicate to the project.

Manager Day said Commissioner Hollinshed had proposed a process for appointment.

Commissioner Hagle said the committee should be small and comprised of five or six members.

Commissioner Hagle asked if the safety of the existing Boardwalk was a concern and if it would pass inspection for another three to five years. He said it was important to know this considering the committee's plan may not start until then.

Manager Day said engineers were on staff would continue monitoring the Boardwalk and making the necessary repairs but the Boardwalk needed to be repaired before 2024.

Commissioner Hollinshed said a plan could be in place but if a massive storm come through the area, it could drastically change the plan and push the work out another two or three years.

Manager Day said construction drawings for repairing the bulkhead were approximately 85 percent complete and he agreed the plan should be developed sooner than later. He said his first question was about membership and if the Board wanted to suggest individuals or advertise the positions.

Commissioner Carter said the positions should be advertised but members of the Board could encourage interested stakeholders to apply.

Commissioner Hagle said the committee should be comprised of six members.

Commissioner Carter said the committee could be six of seven members, not 20 or thirty.

Commissioner Harker said six members is a good round number.

Mayor Newton said Elizabeth City just went through a similar boardwalk repair process and the Board may want to review their committee's structure and mirror a similar process.

Commissioner Carter said individuals on the committee should have expertise.

Manager Day said the recruitment process could begin as earlier as next week. He asked the Board how long they would prefer to accept applications.

Commissioner Carter said Town Clerk Allen Coleman was doing a phenomenal job in getting information out to the public and the process should be open for at least a couple of weeks.

Commissioner Hagle said the recruitment process should be open for two or three weeks.

Commissioner Carter asked if the committee members would be local residents or open to anyone.

Commissioner Hagle said they should be local residents.

Commissioner Hollinshed said consideration should be given to applicants from outside the area if their resume indicates they work in this type of arena each day.

Manager Day said the volunteer application was currently being revised and this may be an appropriate time to expedite that request. He said the application could include a question for the applicant to indicate what their specific connection to Beaufort was and why they were interested in serving on this committee.

Commissioner Hollinshed said that was a great idea.

Commissioner Carter said other committees had a preference and requirement to be in town but this committee may not need a requirement quite as rigid. She said she would prefer the committee be established before the consultants are brought on board.

Commissioner Harker said time was of the essence and it may not make a difference as long as everyone was at the table at the same time.

Mayor Pro-Tempore McDonald said Haywood Weeks needs to be included in the committee. He said Mr. Weeks has a lot of experiencing in managing docks, dredging plans, and so forth.

Commissioner Carter said Haywood could be a part of the committee.

Commissioner Harker said Haywood could apply for the committee if he so choses.

Commissioner Hollinshed said Haywood Weeks has a lot of information the Board knows nothing about and it would benefit the committee and likely the consultants to have Haywood a part of the process.

Commissioner Hagle said Haywood Weeks is not excluded from the committee and he could certainly be a part of the committee.

Commissioner Harker said Haywood was not being excluded by any means of this conversation.

Commissioner Carter said Haywood may prefer to be a consultant verses serving on the Committee. She said he had a wealth of knowledge especially after 40 years of managing the docks.

Commissioner Harker said she was excited about the new volunteer application as this had been discussed for several years.

Commissioner Carter said Town Clerk Allen Coleman was doing a great job on getting applicants to serve on committees and hoped the new application would encourage more to apply.

• Cedar Street Park page 144

Cedar Street Park



TYPE Capital Project
CATEGORY Culture & Recreation
STATUS In Process
IDENTIFIED FY 2018
PROJECT COST $1,355,000
LIFE 50+ Years

CONTACT Rachel Johnson
DEPARTMENT Administration

▶ Status and Updates

This project includes design and construction of a passive park at the site of the former Gallant's Channel drawbridge landing area.

Background and Justification

A popular fishing spot where accommodations can be made for additional passive recreational activities, this is a highly visible piece of property from the high-rise bridge and anchors the end of one of the Town's more prominent streets.

Prior to 2017, NC DOT agreed to provide the Town use of this property. NC DOT also agreed to resurface the road before turning the right-of-way over to the Town. This resurfaced road will serve as the entrance and parking area.

In FY 2017, a preliminary concept plan for the park was completed that relied on extensive public input.

In FY 2020:

- A more refined concept plan was completed with construction drawings to follow;
- NC DOT suspended a number of projects indefinitely until financial shortfalls were overcome, which delayed resurfacing of the road prior to transfer of right-of-way; and An adjacent property owner asked to receive ownership of the right-of-way in front of his property in exchange for him contributing restroom facilities at the park.

In FY 2021:

- Construction drawings are expected to be completed;
- NC DOT is expected to have turned the right-of-way over to the Town, and provide the Town with funding equivalent to the estimated cost of resurfacing the segment of Cedar Street from Moore Street to the western terminus, rather than actually performing the resurfacing work; and
- The Town agreed to abandon a portion of the right-of-way not needed for the park to an adjacent property owner, who has agreed to donate $125,000 to the Town for the construction of a restroom/kiosk at the park.

Manager Day said the Cedar Street Park project was another complicated project since the Town did not actually own all of the property associated with this park. He said NCDOT had to turn over the right of way to the Town before any work could be completed. He said DOT was willing to resurface that portion of Cedar Street but a turnaround circle was needed as well and the Town may be better off to accept funds from DOT and do this resurfacing work inhouse.

Manager Day asked if the Board was interested in NCDOT turning over the entire right away to the Town so the project does not experience any additional delays in development and permitting for the expansion of the marina.

Commissioner Hagle said this was a good idea.

Commissioner Hollinshed said an agreement was already made with Tony Front for the parcel near this area and committed to turning this over in his support of his effort. She asked if the Town would need to modify this agreement because of this scenario.

Manager Day said no. He said it was likely a year or two before Tony would receive all of the appropriate approvals for moving forward on this project. He said the agreement with Tony Front was worded with a stipulation that the property does not get turned over to the marina until those obligations are met.

Commissioner Carter asked if an additional agreement would need to be executed with Tony Frost if the Town chose to assume of the property in this area.

Manager Day said likely this could be done with an amendment to the existing agreement.

Commissioner Hollinshed said the money received from DOT should be earmarked for street resurfacing so the funds are not appropriate to other areas.

Manager Day said the funds would be designated with this specific work.

Commissioner Hagle said DOT was slow and this approach may help expedite the process.

In FY 2022, construction is expected to begin.

▸ **Schedule, Cost, and Funding Estimates**

Cost estimates shown below were developed in FY 2021.

CEDAR STREET PARK

Updated for FY 2022

	COST ESTIMATES
Design, Permit & Bid	$ 95,000
Construction	1,260,000
Total Project Cost	$ 1,355,000

Sufficient funding to complete all elements of the Cedar Street Park plan are not currently available, so initial construction will be limited to currently available funds.

CEDAR STREET PARK - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[CPF] Design, Permit & Bid	70,500	-	-	-	-	-	-
[CPF] Construction	-	542,000	-	-	-	-	-
Total Project Cost	$ 70,500	$ 542,000	$ -	$ -	$ -	$ -	$ -
PROJECT FUNDING							
Capital Project Fund	70,500	362,000	-	-	-	-	-
[GF] Intergovernmental	-	55,000	-	-	-	-	-
[GF] Other Revenues	-	125,000	-	-	-	-	-
Total Project Funding	$ 70,500	$ 542,000	$ -	$ -	$ -	$ -	$ -

Design and construction of Cedar Street Park (as well as Randolph Johnson Park, Phase 1) is funded through a capital project fund established by a $2-million grant from a private foundation. Additional funding comes from another private donation and a contribution from NC DOT described in Status and Updates.

Town staff will apply for additional grants to supplement existing funding for construction of additional park elements.

Commissioner Hollinshed asked for the timeline for implementing this approach with DOT and if all parties were on Board.

Manager Day said this could happen fairly soon. He said this approach was attractive to DOT because they did not have to turn over various areas to different groups and could issue all of it to the Town which is what they were accustom to doing.

Commissioner Carter asked if NCDOT would pass over the funds if the Town agreed to the work.

Manager Day said this was a process and suggestion by their district engineer. He said this process was familiar to them and recently done in New Bern.

Commissioner Harker said the currently proposal was attractive since it allowed for the Town to break even and essentially break-even verses having to dip into the General Fund balance.

Commissioner Carter said every project seem to be more than anticipated and the current proposal outlined the park would cost approximately $870,000, which was an increase from the prior estimates.

Manager Day said those figures were based the consultants estimates and certainly there were pieces of the project that could be tweaked or re-evaluated. He said the Town fully intended to seek other revenue sources and he didn't foresee any issues with obtaining those funds.

Commissioner Carter said the park was supposed to be simple and would be subject to damage from any of the hurricanes.

Commissioner Hagle said the park should be simple and low maintenance.

Commissioner Harker asked if NCDOT would be contacted first of Tony Frost.

Manager Day said NCDOT would be contacted first and then Tony Frost. He said NCDOT will review the guidelines to ensure everything is possible and in place prior to moving any legal documents forward with all of the respective parties.

Commissioner Carter asked if this change would interfere with Tony Frost's anticipated expansion of the marina area.

Manager Day said it would likely remove any complication by getting DOT out of the picture first and create less burden.

Commissioner Carter said anything to simply the process and make it easier would be helpful.

Manager Day said he would begin contacting DOT and start the process for getting all of the property turned over to the Town.

• Cedar Street Utility Line Improvements page 146

Manager Day said this project was currently underway but had a lot of pieces that involved the Department of Transportation, which were still incomplete due to their budgetary uncertainties. He said Greg Meshaw was available to provide a brief update on this work.

Town Engineer Greg Meshaw said essentially the water main work is complete. He said the concentration was now on the sewer work and they were expecting lighting crews at any time, but the work was right on target with the completion date which was sometime in April 2021.

Manager Day said the Cedar Street project was major and had been in bad condition for a while now but the work would be completed and on a very smooth piece of asphalt now. He said it was unfortunate the project had been delayed but it was glad to see some headway.

Commissioner Hagle asked if inspectors were onsite and reviewing the installation of the new lines as well as ensuring compliance with the old ones.

Greg Meshaw said a very experienced inspector was onsite and was monitoring the project. He said the existing lines would be reviewed as part of the USDA project.

Cedar Street Utility Line Improvements



TYPE Capital Project
CATEGORY Utilities
STATUS Complete
IDENTIFIED FY 2020
PROJECT COST $1,287,800
LIFE 30+ Years

CONTACT Greg Meshaw
DEPARTMENT PSA & Engineering

This project will:

- Replace older 6-inch cast iron pipe with new 6-inch ductile iron pipe from Pollock Street to Moore Street before planned repaving of Cedar Street by NC DOT;
- Repair or replace at least eight sanitary sewer manholes; and
- Examine at least four runs of previously lined runs of sanitary sewer and correct any deficiencies found.

Background and Justification

NC DOT plans to replace stormwater lines under Cedar Street, and then install stormwater devices in planted bump-outs to filter out impurities and provide for limited stormwater retention, before resurfacing the entire street.

The 6-inch cast iron pipe water lines beneath Cedar Street have exceeded their service life and are routinely in need of repairs. These repairs typically require removal of pavement followed by placement of a pavement patch. Replacement of these lines by the Town is planned prior to the repaving of Cedar Street by NC DOT.

Repair of sanitary sewer manholes that are known to leak is also planned ahead of the paving so that this new pavement will not have to be removed and then patched to facilitate repair of the manholes.

Investigation of approximately 1,600 linear feet of suspect segments of sanitary sewer is proposed so that any deficiencies can be identified and corrected ahead of the NC DOT paving.

► Status and Updates

In FY 2019 utility design began and was completed in FY 2020.

In early FY 2020, NC DOT suspended a number of projects indefinitely until financial shortfalls are overcome, including their portion of this project.

In FY 2021, the Town completed utility line replacements and repairs. NC DOT funding for the stormwater line replacement portion of the project is anticipated in late 2021. The installation of the stormwater devices and bump-outs is not expected until

Commissioner Carter asked if the project was dealing with lateral lines from the mainline.

Greg Meshaw said yes but this work did not include this work now since they were only replacing a segment of the sewer line.

Commissioner Harker said the project goes from Moore to Pollock Street. She asked if the cast iron pipes would be replaced and why the project didn't go all the way down to Live Oak Street.

Greg Meshaw said the areas between Live Oak Street and Pollock were PVC piping which meant it was newer material and newer construction.

Commissioner Hagle asked if all of the cast iron pipes were coming out.

Greg Meshaw said yes, all of the cast iron pipes were being eliminated.

Commissioner Harker asked how long the gravel patches would be along Cedar Street.

Greg Meshaw said there would be patches of asphalt within the next few weeks.

2022 or 2023 (depending upon NC DOT funding availability), which will immediately be followed by resurfacing.

▸ Schedule, Cost, and Funding Estimates

Cost estimates were revised in FY 2020 based upon an updated opinion of cost from the design engineer subsequent to final design.

CEDAR STREET UTILITY LINE IMPROVEMENTS

Updated for FY 2022

	COST ESTIMATES
Design, Permit & Bid	$ 75,800
Construction	1,200,000
Contingency	12,000
Total Project Cost	$ 1,287,800

The following schedule assumes NC DOT picks this project back up sometime in FY 2021.

CEDAR STREET UTILITY LINE IMPROVEMENTS - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[UF] Capital Outlay	72,000	-	-	-	-	-	-
[CPF] Construction	1,215,800	-	-	-	-	-	-
Total Project Cost	$1,287,800	$ -	$ -	$ -	$ -	$ -	$ -
PROJECT FUNDING							
[UF] Fund Balance	72,000	-	-	-	-	-	-
[CRF] Contribution	1,215,800	-	-	-	-	-	-
Total Project Funding	$1,287,800	$ -	$ -	$ -	$ -	$ -	$ -

Initial project work was tracked through the Utility Fund, with funding coming out of fund balance.

The Cedar Street Utility Line Capital Project Fund was created in late FY 2020 to track all money associated with this project from that point forward. Funding came from contributions to the Capital Reserve Fund, which originated as revenues in the Utility Fund.

▸ Subsequent Impacts

There are no additional operating costs anticipated for this project.

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2 • Fire Station 1 Pumper Truck page 148

Fire Station 1 Pumper Truck



TYPE Equipment Purchase
CATEGORY Public Protection
STATUS Deferred
IDENTIFIED FY 2020
PROJECT COST $622,000
LIFE 20+ Years

CONTACT Tony Ray
DEPARTMENT Fire Department

Purchase of a new fire pumper truck to replace the 1994 pumper truck located at Fire Station 1 on Live Oak Street.

Background and Justification

National Fire Protection Association guidelines for first-line apparatus recommend that apparatus over 25 years old should be replaced. This truck reached that age in 2019.

Status and Updates

This project has not yet been activated. There are no updates.

Schedule, Cost, and Funding Estimates

The following cost estimates were developed in FY 2020 based on current pricing, adjusted to account for inflation through FY 2024. The cost includes not only the vehicle but also the additional gear needed (hose, appliances, fans, rescue equipment, nozzles, etc.) to properly outfit it.

FIRE STATION 1 - PUMPER TRUCK

Updated for FY 2022

	COST ESTIMATES
Apparatus (Vehicle)	$ 550,000
Equipment	72,000
Total Project Cost	$ 622,000

The existing truck will be 30 years old at the time of replacement.

FIRE STATION 1 - PUMPER TRUCK - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Capital Outlay	-	-	-	622,000		-	-
Total Project Cost	$ -	$ -	$ -	$622,000	$ -	$ -	$ -
PROJECT FUNDING							
[GF] Loan Proceeds	-	-	-	622,000		-	-
Total Project Funding	$ -	$ -	$ -	$622,000	$ -	$ -	$ -

This purchase will be funded by a loan. The initial capital outlay will impact the Fire Department budget.

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▶ **Subsequent Impacts**

Debt service costs will impact the Fire Department budget. Funding comes from property tax revenues in the General Fund.

This truck will not have new maintenance impacts as it replaces an existing truck which is already in the maintenance budget.

FIRE STATION 1 - PUMPER TRUCK - SUBSEQUENT BUDGET IMPACTS

Updated for FY 2022

SUBSEQUENT EXPENDITURES	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Debt Service	-	-	-	76,687	76,687	545,216
Total Subsequent Expenditures	$ -	$ -	$ -	$76,687	$76,687	$ 545,216
SUBSEQUENT FUNDING						
[GF] Property Taxes	-	-	-	76,687	76,687	545,216
Total Subsequent Funding	$ -	$ -	$ -	$76,687	$76,687	$ 545,216

Debt service payments assume a 10-year loan at 4%. These figures assume the truck will be purchased late in FY 2024, so debt service will take effect in FY 2025.

Manager Day said this time was anticipated being financed by Chief Tony Ray could provide an overview.

Fire Chief Tony Ray said Pumper Truck for Fire Station 2 at highway 101 would be funded through County Taxes in the fiscal year 2024 budget. He said the estimated cost associated with this truck was based on current estimates but cost were rising significantly each year. He said in order to maintain their insurance ratings and inspection scores a new truck was needed as the existing one was from 1994. He said the new replacement schedule would set a standard for trucks to last approximately 20 years.

Fire Chief Ray said the new EPA or emission standards that were being applied to diesel engines for any piece of equipment with this type of life span was becoming extremely costly.

Commissioner Hollinshed asked for clarification on whether the concept was two for the price of one.

Chief Ray said no, one truck was approximately $560,000. He said staff was looking at the possibility of a fast track program which would allow the truck and gear to be new at the time of the purchase so 10 years could be the starting life span.

Commissioner Carter asked if the County was paying for the new truck.

Chief Ray said the Commissioners needed to look at Fire Pumper truck number 2 which outlined the counties portion of the cost.

Commissioner Hagle said the truck would not be purchased if the County did not pay for it.

Chief Ray said that was correct. He said the County would be replacing a 35 year old truck with the purchase of Fire Station 2. He said this would be paid for by the County out of the central Carteret fire district money.

Commissioner Carter asked if the County had raised any of the fire district funding over the last several years.

Chief Ray said the Town had requested a half cent increases over the last two years specifically for capital reserves. He said the County had a 10 cent cap on the fire district tax and currently Beaufort's rate was at 7 cents with 1.5 cents being dedicated to paying for the new truck.

Commissioner Harker asked if the down payment being referenced was for Pumper Truck station 2.

Chief Ray said yes. He said the Town had applied those additional tax dollars to be applied to the capital reserves.

Manager Day said to be clear the capital reserve is held by the County and funds will come out of money the County raises.

• Fire Station 2 Pumper Truck page 152

Fire Station 2 Pumper Truck



TYPE Equipment Purchase
CATEGORY Public Protection
STATUS In Process
IDENTIFIED FY 2018
PROJECT COST $560,000
LIFE 20+ Years

CONTACT Tony Ray
DEPARTMENT Fire Department

This item includes the purchase of a new fire pumper truck and associated equipment to replace the 1985 pumper located at the fire substation on NC 101 in a rural fire district outside Town limits.

Background and Justification

The National Fire Protection Association guidelines for first-line apparatus recommend that apparatus over 25 years should be replaced. This truck reached that age in 2010.

The pumper is in poor condition and requires frequent maintenance. In order to maintain departmental capabilities to fight structure fires in the county fire districts, dependable replacement apparatus is needed.

This purchase will only be made if the Carteret County Board of Commissioners contributes the necessary funding for both the purchase and on-going maintenance of the pumper truck.

▸ Status and Updates

In FY 2020, this purchase was presented to the Carteret County Board of Commissioners to ask for 1.5-cent increase. A 0.75-cent increase was granted and directed into a County capital reserve fund for the truck along with an initial $100K contribution.

In FY 2021, the Town requested and was granted an additional 0.75-cent increase which was also directed into the County capital reserve fund.

In FY 2022, the purchase will be presented to the Carteret County Board of Commissioners for final purchase approval. The 1.5 cents will be used for debt service in FY 2022 and beyond.

▸ Schedule, Cost, and Funding Estimates

The following cost estimates were updated in FY 2021 and include the additional gear needed (hose, appliances, fans, rescue equipment, nozzles, etc.) to properly outfit the truck.

Capital Improvement Plan

FIRE STATION 2 - PUMPER TRUCK

Updated for FY 2022

	COST ESTIMATES
Apparatus (Vehicle)	$ 500,000
Equipment	60,000
Total Project Cost	$ 560,000

The existing truck will be 38 years old at the time of replacement.

FIRE STATION 2 - PUMPER TRUCK - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Capital Outlay	-	560,000	-	-	-	-	-
Total Project Cost	$ -	$ 560,000	$ -	$ -	$ -	$ -	$ -
PROJECT FUNDING							
[GF] Intergovernmental	-	200,000	-	-	-	-	-
[GF] Loan Proceeds	-	360,000	-	-	-	-	-
Total Project Funding	$ -	$ 560,000	$ -	$ -	$ -	$ -	$ -

The initial capital outlay will impact the Fire Department budget. Funding comes a loan, with a down-payment provided by Carteret County from a capital reserve fund set aside for this truck.

▸ Subsequent Impacts

Debt service costs will impact the Fire Department budget each year. Funding comes from Carteret County Fire District Tax, in Intergovernmental Revenues in the General Fund.

This truck will not have new maintenance impacts as it replaces an existing truck which is already in the maintenance budget.

FIRE STATION 2 - PUMPER TRUCK - SUBSEQUENT BUDGET IMPACTS

Updated for FY 2022

SUBSEQUENT EXPENDITURES	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Debt Service	-	79,560	79,560	79,560	79,560	79,560
Total Subsequent Expenditures	$ -	$ 79,560	$ 79,560	$ 79,560	$ 79,560	$ 79,560
SUBSEQUENT FUNDING						
[GF] Intergovernmental	-	-	79,560	79,560	79,560	79,560
Total Subsequent Funding	$ -	$ -	$ 79,560	$ 79,560	$ 79,560	$ 79,560

Debt service payments assume purchase in FY 2022, using a 5-year loan of $360,000 at 3.5% after a $200,000 down payment, with debt service taking effect in late FY 2022.

• Fire Station 2 Living Quarters and Staffing page 150

Fire Station 2 Living Quarters and Staffing



TYPE Capital Project
CATEGORY Public Protection
STATUS Deferred
IDENTIFIED FY 2018
PROJECT COST $200,000
LIFE 30+ Years

CONTACT Tony Ray
DEPARTMENT Fire Department

This project adds living quarters to Fire Station 2 on NC 101, along with subsequent dedicated 24/7 staffing at the same location.

Background and Justification

This substation serves areas outside of the Town limits, but does not have 24/7 permanent staffing due to insufficient personnel funding from the fire tax district and the absence of living quarters. Response times would improve considerably if this substation were staffed 24/7.

The cost of fire services in this area are partially supported through a fire district property tax levied by Carteret County. Currently, the fire tax proceeds are insufficient to support permanent staffing at the substation.

However, even without dedicated staff at the substation there are occasions, such as during disaster recovery, when availability of the living quarters would be valuable for housing rescue workers.

This project will only be implemented if the Carteret County Board of Commissioners contributes the necessary funding for both the project and the on-going building maintenance costs. Permanent staffing would require additional County funding.

▸ Status and Updates

As of late FY 2021, Carteret County has not yet agreed to fund this project.

▸ Schedule, Cost, and Funding Estimates

The following cost estimates were updated in FY 2021, and include design, construction (including a sprinkler system), furnishings, and contingency.

FIRE STATION 2 - LIVING QUARTERS & STAFFING

Updated for FY 2022

	COST ESTIMATES
Design, Permit & Bid	$ 5,000
Construction	185,000
Furnishings	10,000
Contingency	20,000
Total Project Cost	$ 220,000

The following schedule assumes the County would be ready to fund the project with a one-time contribution in FY 2022.

FIRE STATION 2 - LIVING QUARTERS & STAFFING - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Capital Outlay	-	-	220,000	-	-	-	-
Total Project Cost	$ -	$ -	$ 220,000	$ -	$ -	$ -	$ -
PROJECT FUNDING							
[GF] Intergovernmental	-	-	220,000	-	-	-	-
Total Project Funding	$ -	$ -	$ 220,000	$ -	$ -	$ -	$ -

The initial capital outlay will impact the Fire Department budget. Funding comes from Carteret County as Intergovernmental Revenues in the General Fund.

Fire Chief Tony Ray said the population in this area had increased and the County originally did not want to include sleeping quarters into this stations design. He said the original quote received in 2018 for this upfit was for $125,000 but as of today the price had increase to $190,000. He said these funds would be provided by the County only. He said the staffing associated with this station would be included in fiscal year 2022 and would only be for half of the cost since the positions were not anticipated until December.

Commissioner Carter asked who would be responsible for the cost of staffing this station.

Chief Ray said the County would be responsible.

Manager Day asked if the request would be reduced from six firefighters to three.

Chief Ray said that was correct.

Chief Ray said the County was funding approximately 27 percent of the Town's overall fire department budget and essentially that represented approximately 1 firefighter on each of their shifts. He said the plan was to have two firefighters staffed at station two and four at the in-town station in Beaufort.

Commissioner Hollinshed asked if station two was equipped to handle storms and if the building would have to be abandoned if a powerful storm come through and demolished it.

Chief Ray said station two currently had a wind rating of 136 mile per hour wind rating and it would need to be equipped to handle 150 mile per hour winds, which would require bigger bolts into the foundation. He said this building is sturdy and has endured many hurricanes and actually held up very well.

Commissioner Carter asked about the flooding situation at station two.

Chief Ray said areas around the station had been a concern the station itself had not experienced any flooding.

Mayor Pro-Tempore McDonald asked what the impacts would be to the North River community.

Chief Ray said it would help North River respond to calls. He said although the response time would be reduced the fire rating itself would not change.

Chief Ray said the fire department was responding to a lot of motor vehicle collisions in that area.

Commissioner Hollinshed asked if an EMS staff person would be housed in station two as well.

Chief Ray said as of now that would not be the case. He said Beaufort Emergency Services currently operated as a 501(c)(3) and the County had not expressed any intention of merging the two together in this station.

Commissioner Hollinshed said it may be wise to include them if their were increased motor vehicle accidents in that area.

Chief Ray said the Town had contacted Beaufort EMS about this possibility, but the decision would be up to the County. He said the County was currently re-evaluating plans and having conversations around this issue.

Mayor Newton asked what the percentage of our responses were for calls outside of our jurisdiction.

Chief Ray said that was a moving target but the call count had increased with the increased development and large industries including Jarrett Bay, Eastman's Creek, Deerfield Crossing, etc. He said the EMS response criteria was changed at the beginning of the pandemic which allowed them to respond to more calls but that was shifting back to the normal setup.

- Police Department Building page 154

Manager Day said another project on the books was the Police Department building. He said the staff did take an interim step and remodeled the old Police Department and that project was completed.

Police Chief Paul Burdette said the facility that was remodeled is currently being used as a training facility. He said the facility offers his staff an area with a fully operational kitchen, two independent showers, sink, and toilet units to create more of a comfortable space. He said the primary reason for this remodeling design was to accommodate for major storm events so the Police Department could operate independently.

Manager Day said this facility was powered by generators and this site would be a resource during storm events in addition to the fire department.

Commissioner Carter asked if there was any anticipated land for a future police department.

Manager Day said the Town had raised that issue with the County on several occasions but never received a definite answer.

Police Department Building



This project includes land, design, and construction of a building to house the Police Department at a new location to be determined.

Background and Justification

The current building housing the Police Department is inadequate in size and function. A 2016 space needs analysis estimated space requirements for the Police Department at 6,500 square feet, based on a staff of 20.

The 2016 analysis indicated no further expansion would be possible to accommodate growth at the existing site. A future site would need to accommodate an 8,000-square foot building.

Status and Updates

To accommodate current staff size and operational needs, the current and former Police Department buildings were reconfigured and renovated to improve departmental function in FY 2020. This renovation was not a substitute for this project, but a stop-gap measure until this project is activated.

TYPE	Capital Project
CATEGORY	Public Protection
STATUS	Deferred
IDENTIFIED	FY 2018
PROJECT COST	$4,050,000
LIFE	30+ Years
CONTACT	Paul Burdette
DEPARTMENT	Police Department

▸ Schedule, Cost, and Funding Estimates

The following estimates for land and construction were updated by staff in FY 2021.

POLICE DEPARTMENT BUILDING

Updated for FY 2022

	COST ESTIMATES
Land & Right-of-way	$ 600,000
Design, Permit & Bid	360,000
Construction	2,400,000
Contingency	240,000
Furnishings	250,000
Oversight	200,000
Total Project Cost	$ 4,050,000

As of FY 2022, this project is not on the five-year schedule.

Once this project is activated, a Police Department Building capital project fund will be created to track all money associated with this project, including proceeds from a 20-year loan to be taken out for this project.

▸ Subsequent Impacts

Once the project is complete, the Police Department budget will incur costs of debt service, offset with funding from property tax revenues in the General Fund.

POLICE DEPARTMENT BUILDING - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[CPF] Land & Right-of-way	-	-	-	-	-	-	600,000
[CPF] Design, Permit & Bid	-	-	-	-	-	-	360,000
[CPF] Construction	-	-	-	-	-	-	2,400,000
[CPF] Contingency	-	-	-	-	-	-	240,000
[CPF] Furnishings	-	-	-	-	-	-	250,000
[CPF] Oversight	-	-	-	-	-	-	200,000
Total Project Cost	$ -	$ -	$ -	$ -	$ -	$ -	$4,050,000
PROJECT FUNDING							
[GF] Loan Proceeds	-	-	-	-	-	-	4,050,000
Total Project Funding	$ -	$ -	$ -	$ -	$ -	$ -	$4,050,000

Debt service payments assume a 20-year loan at 4%.

- Pollock Street Stormwater Improvements page 156

Pollock Street Stormwater Improvements

This project will result in improvements to the stormwater collection system at Pollock Street between Broad and Cedar Street to mitigate flooding that typically occurs in this block during heavy rain.

NEW in FY 2020

Public Works

Design and Construction

Total Cost: $160,200

Useful Life: 25 years



Background and Justification

Heavy rainfalls have historically caused significant street and yard flooding in the 300 block of Pollock Street. The proposed project is intended to mitigate this flooding.

Schedule and Funding

This project will only be undertaken if the Town is successful at obtaining Clean Water Act Section 319(h) grant funding. Proceeding with the project will also be dependent upon work with the NCDOT related to stormwater.

In FY 2020, expected design costs total $15,000. In FY 2021, construction costs are forecast at $145,200.

Funding of $96,120 comes from Clean Water Act Section 319(h) grant funding, which reimburses the Town for 60% of all eligible costs. Remaining funding of $64,080 comes through the Capital Reserve Fund–Streets.

	2020	2021	2022	2023	2024	Beyond
Pollock Street Stormwater Improvements						
Project Cost	15,000	145,200	-	-	-	-
Project Funding						
Intergovernmental	15,000	81,120	-	-	-	-
Capital Reserve Fund - Streets	-	64,080	-	-	-	-

Manager Day said this project would likely drop off for a while. He said many of the improvements being done on Pollock Street between Broad and Cedar would require additional planning. He said the majority of these projects and areas would be covered by the USDA project.

Town Engineer Greg Meshaw said the design work for this project had been started prior to his arrival and after the course of several reviews it was determined there was not sufficient fall for the pipe between the bio retention area and the pipping on Cedar Street. He said this project was considered as part of the USDA proposal but the funding may not work out.

Manager Day said this project would have to go back to the drawing board.

Commissioner Hagle asked if the area behind the Wheatley Office building would be looked at since this area flooded badly.

Greg Meshaw said the Coastal Federation was involved in obtaining the funding for this project and after the additional assessment of this area the water tables already are pretty much at the top of the ground.

Commissioner Carter said there is no where for the water to go and that's the main issue with flooding.

The Board went into a scheduled 15-minute break period at 3:30 p.m.

The Board resumed the meeting at 3:45 p.m.

- Public Works Facility page 158

Public Works Facility



TYPE Capital Project
CATEGORY General Services
STATUS Deferred
IDENTIFIED FY 2018
PROJECT COST $2,077,000
LIFE 25+ Years
CONTACT Greg Meshaw
DEPARTMENT PSA & Engineering

This project includes land, design, and construction of a building to house the Public Works Department at a location to be determined.

Background and Justification

The garage and shop buildings at Public Works are antiquated and inadequate for the purposes in which they are used. Additionally, the Randolph Johnson Park master plan calls for two buildings at the current Public Works facility to be repurposed and renovated and all the land to be used to expand the adjacent park facilities.

Status and Updates

This project has not yet been activated. There are no updates.

Schedule, Cost, and Funding Estimates

The following cost estimates were updated by staff in FY 2021.

PUBLIC WORKS FACILITY
Updated for FY 2022

	COST ESTIMATES
Land & Right-of-way	$ 300,000
Design, Permit & Bid	156,000
Construction	1,300,000
Contingency	130,000
Oversight	91,000
Furnishings	100,000
Total Project Cost	$ 2,077,000

As of FY 2022, this project is not on the five-year schedule.

Manager Day said the new public works facility was scheduled to be moved and when that happened this would free up space for expansion of Randolph Johnson Park.

Commissioner Carter said the original plans had the new facility going out beside the water department but there wasn't enough land out there.

PUBLIC WORKS FACILITY - PROJECT BUDGET
Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[CPF] Land & Right-of-way	-	-	-	-	-	-	300,000
[CPF] Design, Permit & Bid	-	-	-	-	-	-	156,000
[CPF] Construction	-	-	-	-	-	-	1,300,000
[CPF] Contingency	-	-	-	-	-	-	130,000
[CPF] Oversight	-	-	-	-	-	-	91,000
[CPF] Furnishings	-	-	-	-	-	-	100,000
Total Project Cost	$ -	$ -	$ -	$ -	$ -	$ -	$2,077,000
PROJECT FUNDING							
[GF] Loan Proceeds	-	-	-	-	-	-	2,077,000
Total Project Funding	$ -	$ -	$ -	$ -	$ -	$ -	$2,077,000

Once this project is activated, a Public Works Facility capital project fund will be created to track all money associated with this project, including proceeds from a loan taken out for this project.

▸ Subsequent Impacts

Once the project is complete, the Public Works budget will incur costs of debt service, with funding from property tax revenues in the General Fund.

PUBLIC WORKS FACILITY - SUBSEQUENT BUDGET IMPACTS
Updated for FY 2022

SUBSEQUENT EXPENDITURES	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Debt Service	-	-	-	-	-	3,056,586
Total Subsequent Expenditures	$ -	$ -	$ -	$ -	$ -	$3,056,586
SUBSEQUENT FUNDING						
[GF] Property Taxes	-	-	-	-	-	3,056,586
Total Subsequent Funding	$ -	$ -	$ -	$ -	$ -	$3,056,586

Debt service payments assume a 20-year loan at 4%.

Manager Day said there was a possibility out behind the Glenda Street water plant but that would come a little bit later. He said staff had assessed the property, but additional information would be coming before the Board in the future.

- Randolph Johnson Park page 160

Randolph Johnson Park



This project includes the redesign and construction of Randolph Johnson Park in two phases.

Phase 1 includes: closing part of Pine Street to expand the park area; relocating fencing; redeveloping the park to include a splash pad, playground; a restroom/shelter building; and a sidewalk to connect existing tennis and basketball courts.

Phase 2 includes: conversion of the existing Public Works facility to expand the park, connecting with existing tennis courts.

TYPE Capital Project
CATEGORY Culture & Recreation
STATUS Deferred
IDENTIFIED FY 2018
PROJECT COST $3,005,000
LIFE 50+ Years
CONTACT Rachel Johnson
DEPARTMENT Administration

Background and Justification

This is a long-standing project endorsed by the Parks and Recreation Advisory Board and the Town Board. It provides a more appropriate use of Town property in a residential area, while improving stormwater management in an area prone to flooding.

Status and Updates

In FY 2018, the Town Board adopted a master plan for this park. In FY 2019, Phase 1 planning and site preparation occurred. In FY 2020, Phase 1 construction began and was completed FY 2021.

Phase 2 cannot begin until a new Public Works facility is built elsewhere.

➨ Refer to *Public Works Facility* earlier in this section for more information.

► **Schedule, Cost, and Funding Estimates**

The following cost estimates were provided by the consultants who prepared the park master plan, and apply to Phase 2 only.

RANDOLPH JOHNSON PARK
Updated for FY 2022

	COST ESTIMATES
Design, Permit & Bid	$ 257,000
Construction	2,316,000
Contingency	232,000
Furnishings	200,000
Total Project Cost	$ 3,005,000

Manager Day said phase one of this project had been completed but he remaining phases would be held off until the Public Works facility was relocated.

Commissioner Hollinshed asked if the water tower would be moved in addition to Public Works.

Manager Day said the cost associated with this type of move would be extremely expensive. He said at one point the Board had considered naming the park as the Water Tower Park.

Commissioner Hollinshed said this would become a landmark for folks navigating the community.

RANDOLPH JOHNSON PARK - PROJECT BUDGET
Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[CPF] Design, Permit & Bid			-	-	-	-	257,000
[CPF] Construction			-	-	-	-	2,316,000
[CPF] Contingency	-	-	-	-	-	-	232,000
[CPF] Furnishings	-	-	-	-	-	-	200,000
Total Project Cost	$ -	$ -	$ -	$ -	$ -	$ -	$ 3,005,000
PROJECT FUNDING							
[GF] Loan Proceeds	-	-	-	-	-	-	3,005,000
Total Project Funding	$ -	$ -	$ -	$ -	$ -	$ -	$ 3,005,000

Funding for design and construction of Randolph Johnson Park-Phase 2 is anticipated to come from General Fund revenues. Grant funding will also be sought to support this project.

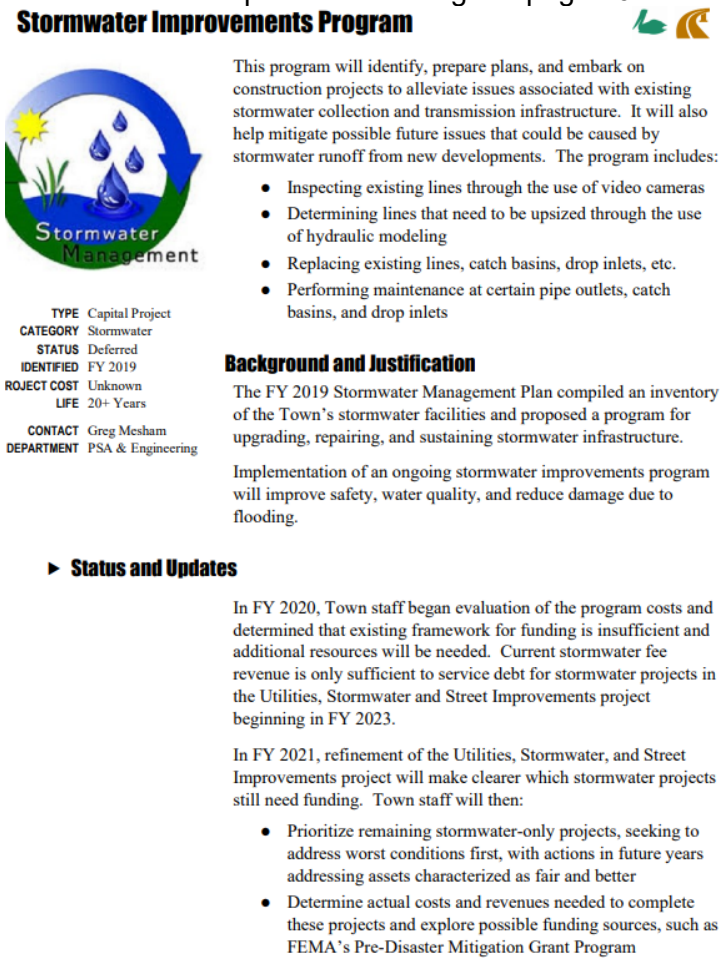
► **Subsequent Impacts**

Once the project is complete, the Town will incur debt service, which will be offset with revenue from property tax revenues in the General Fund.

RANDOLPH JOHNSON PARK - SUBSEQUENT BUDGET IMPACTS
Updated for FY 2022

SUBSEQUENT EXPENDITURES	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Debt Service	-	-	-	-	-	4,422,263
Total Subsequent Expenditures	$ -	$ -	$ -	$ -	$ -	$ 4,422,263
SUBSEQUENT FUNDING						
[GF] Property Taxes	-	-	-	-	-	4,422,263
Total Subsequent Funding	$ -	$ -	$ -	$ -	$ -	$ 4,422,263

- Stormwater Improvements Program page 162



Stormwater Improvements Program

Stormwater Management

TYPE Capital Project
CATEGORY Stormwater
STATUS Deferred
IDENTIFIED FY 2019
ROJECT COST Unknown
LIFE 20+ Years

CONTACT Greg Mesham
DEPARTMENT PSA & Engineering

This program will identify, prepare plans, and embark on construction projects to alleviate issues associated with existing stormwater collection and transmission infrastructure. It will also help mitigate possible future issues that could be caused by stormwater runoff from new developments. The program includes:

- Inspecting existing lines through the use of video cameras
- Determining lines that need to be upsized through the use of hydraulic modeling
- Replacing existing lines, catch basins, drop inlets, etc.
- Performing maintenance at certain pipe outlets, catch basins, and drop inlets

Background and Justification

The FY 2019 Stormwater Management Plan compiled an inventory of the Town's stormwater facilities and proposed a program for upgrading, repairing, and sustaining stormwater infrastructure.

Implementation of an ongoing stormwater improvements program will improve safety, water quality, and reduce damage due to flooding.

▸ **Status and Updates**

In FY 2020, Town staff began evaluation of the program costs and determined that existing framework for funding is insufficient and additional resources will be needed. Current stormwater fee revenue is only sufficient to service debt for stormwater projects in the Utilities, Stormwater and Street Improvements project beginning in FY 2023.

In FY 2021, refinement of the Utilities, Stormwater, and Street Improvements project will make clearer which stormwater projects still need funding. Town staff will then:

- Prioritize remaining stormwater-only projects, seeking to address worst conditions first, with actions in future years addressing assets characterized as fair and better
- Determine actual costs and revenues needed to complete these projects and explore possible funding sources, such as FEMA's Pre-Disaster Mitigation Grant Program

Manager Day said another part of this project was taking a look at the stormwater fee structure we have currently. He said now that the area included more commercial property, actually sort of assess what the impervious area is and coming up with a different fee structure. He said in other areas an increased fee would only produce about fifteen thousand dollars a year and stormwater work was fairly expensive.

Town Engineer Greg Meshaw said the Town was tackling six different areas across town with the USDA funds and one of those high priority items was stormwater drainage. He said after meeting with many constituents across town there were a lot of stormwater issues. He said some projects require a lot more work than others and he would start to compile a list of capital improvement items for the Board to consider and prioritize each year as part of this Capital Improvement Plan.

Commissioner Carter asked if this was an area the Board should consider increasing the stormwater fee.

Greg Meshaw said stormwater work was expensive.

Commissioner Carter asked if the current rate was $48 per year.

Manager Day said he believed so but there were some limitations on stormwater fees.

Commissioner Hagle asked if the six projects could be reviewed.

Greg Meshaw said drainage between Fulford and Yaupon and then down to Front Street, extending back along that creek that is next to the park area on Yaupon and then carry

some drainage pipe, if the Town can get easements over to Elm Street. He said another one is on Mulberry Street from east of Queen all the way over to Craven and reworking the drainage in there because of upsizing pipes and regrading pipes.

Greg Meshaw said one is along Queen Street where they would be providing a number of catch basins and then carrying that stormwater towards Front Street and then also providing some additional drainage structures along Front Street. He said another one is on Broad street to either side of Marsh Street, extending about a half a block in each direction to pick up the drainage in that area He said one along Broad Street, pretty much in front of the the old train depot extending down to the police annex.

- Utility Line, Stormwater, & Street Improvements page 168

Utilities, Stormwater, & Street Improvements



TYPE Capital Project
CATEGORY Infrastructure
STATUS In Process
IDENTIFIED FY 2019
PROJECT COST $30,779,851
LIFE 15+ / 50+ years

CONTACT Greg Meshaw
DEPARTMENT PSA & Engineering

Based upon assessments of road and utility and storm water line conditions, this program provides for the replacement of water and sewer utility lines, stormwater lines, and road rehabilitation and resurfacing to streets affected streets.

Background and Justification

In FY 2019, a Water Asset and Inventory Analysis identified over $19 million in needed water line replacements. A 2010 sewer inflow and infiltration analysis revealed extensive work needed to repair and replace sewer lines, estimated by staff to equal a similar amount.

The lines in the worst conditions are in the oldest parts of Beaufort. The roads in this area, generally, have also been identified as being in poor to failed condition.

▸ Status and Updates

In the latter part of FY 2020, staff, supported by consulting engineers, submitted preliminary engineering reports, environmental assessments, and applications to secure a combination of grants and loans from USDA Rural Development. In March, 2021, USDA/RD offered the Town a financing package consisting of $5,505,000 in grants and $18,074,000 in low interest, long term loans for the utility and storm water portion of this project. The Town will now move to the design, permitting, and bidding phase, which will likely take a little more than a year.

▸ Schedule, Cost, and Funding Estimates

The following estimates are developed in conjunction with consultants who prepared the Preliminary Engineering Reports for the application for USDA funding.

UTILITY LINE, STORMWATER, & STREET IMPROVEMENTS
Updated for FY 2022

	COST ESTIMATES
Planning	$ 132,000
Design, Permit & Bid	2,019,270
Oversight	1,152,800
Legal, Fiscal & Admin	271,000
Contingency	2,289,605
Construction	23,310,367
Interim Financing	1,604,809
Total Project Cost	$ 30,779,851

The costs assume project design and permitting starts late-FY 2021, culminating with construction contract bidding and award by the end of FY 2022. Construction will follow in FY 2023, to be completed by FY 2025.

Funding for this project is complicated. In FY 2021 and FY 2022, design costs will be funded through capital reserve funds, and later reimbursed through proceeds from the USDA loans. In FY 2023, an interim loan (known as bond anticipation notes) for the project will be obtained as bridge funding, as the USDA financing proceeds are not available until after construction is completed. Debt service on the interim loan will be limited to interest only and will be capitalized, then the entire principal on the interim loan will be paid by proceeds from the USDA loan and grants.

A conventional loan will be used for the street resurfacing portion of this project. Debt service is anticipated to begin in FY 2025 to cover that part of the project.

UTILITY LINE, STORMWATER, & STREET IMPROVEMENTS - PROJECT BUDGET

Updated for FY 2022

PROJECT EXPENDITURES	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
[CPF] Planning	$ 132,000	-	-	-	-	-
[CPF] Design, Permit & Bid	-	1,602,070	-	417,200	-	-
[CPF] Oversight	-	-	487,000	487,000	178,800	-
[CPF] Legal, Fiscal & Admin	-	-	223,000	-	48,000	-
[CPF] Contingency	-	-	846,803	846,803	596,000	-
[CPF] Construction	-	-	8,675,183	8,675,183	5,960,000	-
[CPF] Interim Financing	-	-	802,404	802,404	-	-
Total Project Cost	$ 132,000	$ 1,602,070	$ 11,034,390	$ 11,228,590	$ 6,782,800	$ -
PROJECT FUNDING						
[GF] Property Taxes	45,000		-	-	-	-
[UF] Fund Balance	87,000	-	-	-	-	-
[CRF] Streets	-	254,000	-	417,200	-	-
[CRF] Utilities	-	1,348,070	-		-	-
[CPF] Interim Loan	-	-	11,034,390	10,811,390	-	-
[CPF] Intergovernmental	-	-	-		-	-
[CPF] Loan Proceeds	-	-	-		6,782,800	-
Total Project Funding	$ 132,000	$ 1,602,070	$ 11,034,390	$ 11,228,590	$ 6,782,800	$ -

In prior years, planning costs were funded through both the General Fund and Utility Fund. In late FY 2020, a Utilities, Stormwater, and Street Improvements capital project fund was created to track all expenditures and funding moving forward. In late FY 2021 two capital project funds were established to track this project: one for the storm water and street portions of the project (debt service for these will be paid from the General Fund), and the other for the water and sewer portion of the project (debt service for these will be paid from the Utility Fund).

► Subsequent Impacts

Debt service will impact the General Fund for the street and stormwater portions of the project. Utility line debt service will impact the Utility Fund.

UTILITY LINE, STORMWATER, & STREET IMPROVEMENTS - SUBSEQUENT BUDGET IMPACTS

Updated for FY 2022

SUBSEQUENT EXPENDITURES	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Beyond
[GF] Debt Service	-	-		338,507	677,014	11,540,039
[UF] Debt Service	-	-		240,555	481,110	18,522,735
Total Subsequent Expenditures	$ -	$ -	$ -	$ 579,062	$ 1,158,124	$ 30,062,774
SUBSEQUENT FUNDING						
[GF] Property Taxes	-			290,500	581,000	7,843,500
[GF] Permits and Fees	-	-		48,007	96,014	3,696,539
[UF] Sales and Service	-	-	-	240,555	481,110	18,522,735
Total Subsequent Funding	$ -	$ -	$ -	$ 579,062	$ 1,158,124	$ 30,062,774

Debt service calculations assume:

- FY 2023 USSI interim financing loan – Bond Anticipation Notes, 2-year, 2% interest on $23.58 with first payment mid-FY 2023
- FY 2025 USSI Streets loan – conventional, 15-year, 2.5% interest loan on $7.2M with first payment mid-FY 2025
- FY 2025 USSI Stormwater loan – USDA, 40-year, 1.25% interest loan on $3M with first payment in FY 2025
- FY 2025 USSI Utilities loan – USDA, 40-year, 1.25% interest loan on $15.1M with first payment in FY 2025

Funding to offset debt service comes from:

- General Fund property taxes – to cover the FY 2025 USSI Streets loan payments, with 2 cents earmarked by the Town Board in FY 2018 and expanded in FY 2019 and subsequent years to service debt for road improvements
- General Fund stormwater fees – to cover the FY 2025 USSI Stormwater loan. No fee increases are required.
- Utility Fund sales and service – to cover FY 2025 USSI Utilities loan payments. No fee increases are anticipated.

Manager Day said this project was associated with USDA financing and a lot of time had been spent talking about this one recently. He said the Board may recall the report they received about being awarded almost $5.5 million dollars in grants and almost $18.1 million dollars in low interest long term loans from the USDA. He said this is a fairly complicated project. He said the total budget for this project is close to $31 million dollars and this included storm water, sewer, water, and streets.

Manager Day said staff would be bringing back to the Board at their next to work session, contracts for the engineering work for each of the projects listed. He said he would expect the the design and permitting phase to begin in the late fiscal 21 before the end of this year, maybe as soon as May. He said then staff would hope to have everything in that phase, including bidding an award by the end of fiscal year 22, and then construction would follow in fiscal year 23.

Commissioner Carter asked if each of the projects would run concurrently verses being separated out.

Manager Day said yes, the plan was to start each of the projects together and have them all running at the same time.

Manager Day said a contractor would be on board first and control the scope of the entire project since some streets would be effected by all of the new water lines, rehabilitation of sewer lines or vice versa, and stormwater lines and it doesn't make much sense to tear the roads up two and three times when all the work could be done at once.

Commissioner Hagle asked if one contractor would be awarded the contract and then they would be responsible for sub-leasing for the varies projects.

Manager said that was his hope.

Commissioner Hagle asked if the paving work would be done as part of the sub-contractors or a separate contract between a vendor and the Town.

Town Engineer Greg Meshaw said typically utility contractors are not pavers. He said the intention was to have a contractor perform all of the utility work and then contractor out a paving company to come in a paving all of the roads effected.

Commissioner Carter said there would be unhappy people across town if the roads were tourn up for multiple years.

Greg Meshaw said the roads would not be torn up for several years. He said the hope would be the patch work would be completed at the same time or thereabouts.

Commissioner Harker asked if there would be another time for discussion around what projects would be funded and moving forward since the Town was not awarded all of the funds requested.

Manager Day said yes, with the debt service re-calculation all of the proposed projects would be completed.

Commissioner Hollinshed said some money would be freed up with the interest rate being cut.

Manager Day said that certainly helped.

- New Projects

1410 Front Street Storm Water Culvert Relocation



TYPE	Capital Project
CATEGORY	Storm Water
STATUS	Deferred
IDENTIFIED	FY 2022
PROJECT COST	$209,000
LIFE	50 Years
CONTACT	GREG MESHAW
DEPARTMENT	UTILITIES

The abandonment of the storm water culvert located directly beneath the house located at 1410 Front Street is proposed by filling it with a flowable type fill. Abandonment of this culvert will be accompanied by its replacement with the construction of a new culvert along a different route to Taylors Creek.

Background and Justification

The culvert beneath 1410 Front Street conveys storm water runoff from the 100 block of Belle Air Street. It outlets to the rear of the house at Taylors Creek. During 2020, staff learned that there were significant accumulations of water in the crawl space of the house from time-to-time. Staff's investigation revealed the storm water culvert to have multiple obstructions that could have potentially contributed to the accumulation of water. The line was ultimately cleared by Public Works thereby allowing for proper drainage. Through this effort staff also discovered an intersecting line that extended eastward onto 1500 Front Street. This line was subsequently cleared when it was discovered to be obstructed.

Public Works staff was again contacted in 2021 by the property owner who has indicated that water continues to accumulate in the crawl space. The owner has further indicated his belief that the culvert under the house is the source of this water. Additionally, it is worth noting that the 1500 Front Street parcel was vacant upon discovery of the aforementioned line. A new residential structure has since been constructed thereby placing the at least part of the line under the house.

Existence of a storm water culvert beneath a structure makes for a less than ideal situation that should be corrected. The crawl space issue perceived as being attributable to the culvert, whether true or not, makes the need for corrective measures even more evident.

Status and Updates

This is a newly proposed project.

Schedule, Cost, and Funding Estimates

The estimate to design, permit and construct the replacement storm water lines and to abandon the existing culvert beneath 1410 Front

Commissioner Carter asked if the Town had an easement for the culvert located underneath the house.

Town Engineer Meshaw said no.

Commissioner Hollinshed asked how many other culverts were across town.

Greg Meshaw said he knows of at least two or three more.

Commissioner Hagle said one was located across the street from him.

Commissioner Carter asked if the culvert underneath the house created a safety hazard as far as stability of the house.

Greg Meshaw said not to his knowledge, but the area would be filled with flowable fill which is similar to concrete. He said obtaining easements could be time consuming and that option had not been considered at this time.

Commissioner Harker asked if the Town checked for culverts before allowing new homes to be build to ensure this doesn't happen again with new property.

Director Kyle Garner said yes.

Commissioner Carter said a situation occurred about 10 years ago which cost the town a great deal of money.

Commissioner Hagle said approximately $10,000.

Public Works Sweeper Truck



TYPE	Capital Project
CATEGORY	General Services
STATUS	Deferred
IDENTIFIED	FY 2022
PROJECT COST	$200,000
LIFE	10 Years
CONTACT	GREG MESHAW
DEPARTMENT	PUBLIC WORKS

The purchase of a new sweeper truck is proposed to replace the sweeper truck that Public Works currently uses to sweep and vaccum Town streets and Town-owned/maintained parking lots.

Background and Justification

A replacement sweeper truck is proposed because the existing one is 15 years old and in poor condition – it was out of service for a number of weeks last uear and required significant repairs The American Public Works Association places the useful life of street sweepers at 10 years and recommends that evaluations of the sweepers should begin in the seventh year.

Status and Updates

This is a newly proposed asset.

Schedule, Cost, and Funding Estimates

The estimate to acquire a sweeper truck is as follows.

SWEEPER TRUCK
Originated for FY2022

	COST ESTIMATES
Capital Outlay	$ 200,000
Total Project Cost	$ 200,000

The following schedule of expenditures is proposed. It is accompanied by the method of funding currently envisioned.

SWEEPER TRUCK - PROJECT BUDGET
Originated for FY2022

PROJECT EXPENDITURES	FY2022	FY2023	FY2024	FY2025	FY2026
Capital Outlay		200,000	-	-	
Total Project Cost	$ -	$ 200,000	$ -	$ -	$ -
PROJECT FUNDING					
[GF] Property Tax	-	200,000			
Total Project Funding	$ -	$ 200,000	$ -	$ -	$ -

Commissioner Carter asked if the truck was needed.

Town Engineer Greg Meshaw said he believed. He said this particular truck was selected because of its vacuum capabilities on permeable pavement which was becoming more popular across Town.

Commissioner Harker asked if this new truck would still provide the street service in addition to the pervious concrete clean-up.

Greg Meshaw said yes.

Commissioner Hagle said in the fall the streets had to be kept clean and clutter free from all the leaves that fall.

Commissioner Harker said a street sweeping schedule would help the public to know when the truck was making it's way to there area.

Commissioner Hagle said it would be a good idea to publish a sweeping schedule.

FIRE BOAT REPLACEMENT



TYPE:	Equipment Purchase
CATEGORY:	Public Protection
STATUS:	Deferred
IDENTIFIED:	FY 2022
PROJECT COST:	$200,000
LIFE:	10+ years
CONTACT:	Tony Ray
DEPARTMENT:	Fire Department

Purchase of a new fire boat to replace the current 2016, converted recreational watercraft.

Background and Justification

The new watercraft will replace our 2016 fire boat in 2026 which will have exhausted its useful life.

In order to maintain and improve departmental capabilities to adequately meet marine firefighting, water rescue, and recovery demands, a dependable, purpose-built watercraft is required

Status and Updates

This project has not yet been activated.

Schedule, Cost and Funding Estimates

FY 2026 project costs are estimated at $200,000.

The cost estimates were developed in FY 2021 based upon current pricing, adjusted to account for inflation through FY 2025. The cost includes not only the vessel but also the additional gear needed (hose, nozzles, rescue gear etc.) to properly outfit it.

FIRE BOAT – STATION 1

COST ESTIMATES

Vessel	$ 190,000
Equipment	$ 10,000
Total Project Cost	$ 200,000

Commissioner Harker asked how old the current fire boat vessel was.

Fire Chief Tony Ray said the existing boat was five to six years old and after reviewing the vehicle replacement schedule this is the year the boat fell. He said currently the boat was meeting the need but this project was being proposed in fiscal year 2026.

Commissioner Carter asked if it was a single engine vessel.

Commissioner Hollinshed asked if this new boat would fit in the existing slip

Chief Ray said not at the present time but since the docks may be reconstructed this would be the appropriate time to address this issue. He said this vessel would be dual engines.

Manager Day said this vessel was currently funded in fiscal year 2025 through the five-year plan.

Mayor Pro-Tempore McDonald asked if firefighters were required to be licensed on how to operate this vessel.

Chief Ray said the department did not currently have a license requirement but the several of his employees has their own personal licenses. He said their was a training schedule and each of his employees did go through training on how to operate the watercraft.

Commissioner Hollinshed asked how many other municipalities had similar vessels.

Chief Ray said there is no other boat like this one that is used by any local government in Carteret County. He said Morehead City had a similar boat to Beaufort currently but Atlantic Beach and Harkers Island both had smaller vessels than what the Town had currently.

Commissioner Hagle asked if this vessel could be something the County funded opposed to the Town.

Chief Ray said this conversation had been started.

Commissioner Hagle asked if this boat could be funded regionally and since it appeared to be serving multiple areas and not just Beaufort.

Chief Ray said this conversation had started with the Fire Chief in Morehead. He said he wanted to introduce this item to the Board now so discussions could be started before the current boat expired.

Town Engineer Greg Meshaw provided an overview of the background related to the Sewer Pump Station #7 and Station #1 Replacements.

Sewer Pump Station #7 Replacement



Full replacement of sewer pump station #7 is proposed to include a submersible sewage lift station with all equipment and piping, controls, electrical service upgrades, diesel generator, site improvements and the demolition/abandonment of the existing below ground wet pit/dry pit style lift station. The replacement station may be of a higher pumping capacity. The need for such an upgrade will be examined during the design process.

TYPE Capital Project
CATEGORY Utilities
STATUS Deferred
IDENTIFIED FY 2022
PROJECT COST $740,000
LIFE 40 Years

CONTACT Greg Meshaw
DEPARTMENT Public Utilities

Background and Justification

Sewer pump station #7 was constructed about 1969 and is operating in excess of the life normally expected for this type of station. In addition, the dry pit portion of this station holds the potential for life and safety issues for maintenance personnel. The dry pit is a deep metal vertical cylinder that houses both the electrical controls and pumps that serve the lift station. Maintenance of the station requires physical entry into a confined space, requiring entry with a tripod and metal cable, by maintenance personnel. Entry is made near electrical equipment surrounded by metal. When stations flood unexpectedly from leaks or during storm events the maintenance of equipment with the combined hazards of sewage gases and electricity pose a safety hazard to life and limb from electrocution, and/or possibly explosion.

Status and Updates

This project is not yet active.

Schedule, Cost, and Funding Estimates

The preliminary cost estimate to design, permit and construct the project is as follows.

PUMP STATION #7 REPLACEMENT
Originated for FY2022

	COST ESTIMATES
Design, Permit & Bid	$ 90,000
Construction	$ 600,000
Construction Admin & Observation	$ 50,000
Total Project Cost	$ 740,000

Commissioner Carter asked if the replacement would be an above ground station.

Town Engineer Greg Meshaw said the replacement would be a submersible pump station, where it is a wet pit and the pumps are lowered down into the wet pit. He said if any repairs were needed essentially the pumps would be hoisted up to the top side and you would perform the work above ground.

Commissioner Hollinshed asked if there would be superstructure on the side of this pump station to allow for maintenance.

Greg Meshaw said there would be control panels underneath a small rain guard.

Commissioner Hagle asked where this sewer pump station would be located.

Greg Meshaw said this one was located at the County School Bus Garage and as best he could tell their was no easement associated with this station. He said because the land associated with the sewer station was own the School System permission would need to be granted before proceeding with this project.

Commissioner Hollinshed said since a replacement was happening if the station could be moved closer into town where the land was already owned or the Town had an existing easement.

Greg Meshaw said that would be costly with having to relocate gravity lines and the existing infrastructure.

Commissioner Hagle said this item was important and it was critical to maintain.

Manager Day said there were approximately 20 pump stations across town and many of them were old.

Commissioner Harker said the pump station behind the bus garage was working somewhat but still a lot of water gathered in that area. She asked if there was an efficiency measure or functionality that would help gauge the effectiveness.

Greg Meshaw said this type of pump in this station is fairly efficient. He said the typical life for one of the stations is 40 years but the equipment inside the pump usually only held a life of about 20 years.

Commissioner Carter asked why the cost varied between the two stations.

Greg Meshaw said a wet pit drop pit type pump station was usually more expensive than a submersible pump station.

Commissioner Hagle said the replacement of the pump stations should be on a schedule.

Manager Day said this was budgeted in fiscal year 2025 and the financing would be from capital reserves.

Mayor Newton said if a failure was to occur to one of the sewer pump stations, for example if a storm rolled through and completely damaged a pump, he asked how would this be paid for.

Greg Meshaw said the Town had water intrusion where the sump pump failed to operate during a flooding event but any major work would require significant funding.

Sewer Pump Station #1 Replacement



TYPE Capital Project
CATEGORY Utilities
STATUS Deferred
IDENTIFIED FY 2022
PROJECT COST $1,035,000
LIFE 40 Years

CONTACT Greg Meshaw
DEPARTMENT Public Utilities

Full replacement of sewer pump station #1 is proposed to include a submersible sewage lift station with all equipment and piping, controls, electrical service upgrades, diesel generator, site improvements and the demolition/abandonment of the existing below ground, wet pit/dry pit style lift station. The replacement station may be of a higher pumping capacity. The need for such an upgrade will be examined during the design process.

Background and Justification

Sewer pump station #1 was constructed during the 1960's and is operating in excess of the life normally expected for this type of station. In addition, the dry pit portion of this station holds the potential for life and safety issues for maintenance personnel. The dry pit is a deep metal vertical cylinder that houses both the electrical controls and pumps that serve the lift station. Maintenance of the station requires physical entry into a confined space, requiring entry with a tripod and metal cable, by maintenance personnel. Entry is made near electrical equipment surrounded by metal. When stations flood unexpectedly from leaks or during storm events the maintenance of equipment with the combined hazards of sewage gases and electricity pose a safety hazard to life and limb from electrocution, and/or possibly explosion.

Status and Updates

This project is not yet active.

Schedule, Cost, and Funding Estimates

The preliminary cost estimate to design, permit and construct the project follows.

PUMP STATION #1 REPLACEMENT
Originated for FY2022

	COST ESTIMATES
Design, Permit & Bid	$ 120,000
Construction	$ 850,000
Construction Admin & Observation	$ 65,000
Total Project Cost	$ 1,035,000

The following schedule of expenditures is proposed. It is accompanied by the method of funding currently envisioned.

Town Egineer Greg Meshaw provided an overview of the proposed Water Treatment Plant Project.

Water Treatment Plant



TYPE Capital Project
CATEGORY Utilities
STATUS Deferred
IDENTIFIED FY 2022
PROJECT COST $27,500,000
LIFE 50 Years

CONTACT GREG MESHAW
DEPARTMENT UTILITIES

The construction of a new water treatment plant is proposed. The aging Pine Street Water Treatment Plant will be decommissioned upon the completion of the new plant. Accordingly, the new plant will be sized to replace the treatment capacity that will be lost by the decommisioning of the Pine Street Water Plant plus that necessary to accommodate future growth in water demands.

Background and Justification

The Town of Beaufort operates two water treatment plants: the Pine Street Treatment Plant and the Glenda Drive Treatment Plant. The main building of the Pine Street facility includes areas for storage, softeners, and an operation center/laboratory. This building is over 100 years old, built with brick and construction techniques of that age. In 2017 a Preliminary Structural Assessment was conducted of the main building, plus the adjacent well building and the High Service Pump/Chemical Feed Building. The assessment highlighted a number of deficiencies at all three buildings. While the Town did implement a degree remedy for these deficiencies, the buildings are old and have exceeded their useful service life. Likewise, most of the water treatment plant equipment is operating beyond its useful service life.

The Town's other facility, the Glenda Drive Water Treatment Plant, was built in 1986 and is now 35 years old. The facility includes two small concrete block buildings; one houses two softeners and the other houses Well No. 3 with its vertical turbine pump and associated valves, meter and piping for conveyance of raw water to the treatment process equipment. Under the same roof is electrical gear, a basic laboratory and two chemical feed rooms, plus a covered area for the auxiliary generator. In addition to these buildings the facility includes a 200,000 gallon elevated water storage tank, plus a 300,000 gallon above grade clearwell/ground storage tank.

The Glenda Drive WTP site is limited by its small size and adjacent residential property. The extent and arrangement of the existing facility does not easily lend itself to on-site expansion.

Status and Updates

This project is not yet active.

Commissioner Carter said this item was originally on the Boards radar several years ago and the Board received a presentation on those designs. She said the presentation included osmosis and saltwater instruction and the cost at that time was $22,000,000. She said the Board and staff had anticipated a 10-year plan before that was to be built.

Manager Day said that was the intention of this project proposal and it would be beneficial to go ahead and get the project on the books.

Commissioner Hagle asked if the Town built the new water treatment plant at the Glenda Drive location if this would replace the Pine Street plant.

Greg Meshaw said there was not enough room at Glenda drive for expansion or upgrade of a plant adjacent to the existing one. He said the lot and room available was extremely small in comparison to what was needed.

Commissioner Hollinshed said several municipalities in the area had issues with salt water intrusion and was curious if this issue was creeping toward Beaufort.

Greg Meshaw said his analysis, which was done several years ago, revealed that salt water intrusion issue had actually slowed down but there may be more recent data analysis available. He said the new plant would include cost associated with an Aeroplan and reverse osmosis.

Commissioner Hollinshed said recent government actions revealed there may be some funds available for this type of work.

Manager Day said the Town may be eligible for these funds. He said Rivers and Associates had performed a comprehensive plan several years back so the work was essentially already prepared.

Commissioner Hagle said staff could use the old plan and tweak it minimally to meet the needs of the Town today.

Manager Day said this was discussed and that was the direction staff was headed. He said the additional funds being proposed by the infrastructure bill was not included at this time but could certainly be updated once the requirements had been fine tuned.

Manager Day said that concluded the items for todays session.

Mayor Newton reminded the Board the next Retreat session would be held Friday, March 12, 2021 at 2:00 p.m.

[ADJOURN]

A motion was made by Commissioner Hagle to adjourn the meeting.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANIMOUS (5-0)

The meeting adjourned at 5:02 p.m.

_____
Everette “Rett” Newton
Mayor

_____
Allen Coleman
Town Clerk

DRAFT

MINUTES
TOWN OF BEAUFORT
BOARD OF COMMISSIONERS
VIRTUAL REGULAR MEETING
APRIL 12, 2021
6:00 P.M.

Due to the State of North Carolina's Declaration of Emergency in response to the COVID-19 pandemic and per NCGS § 166A-19.24, the Town of Beaufort Board of Commissioners conducted a remote meeting using the Zoom application. Members of the Board of Commissioners participated in the meeting remotely.

The Town of Beaufort Board of Commissioners met remotely for a regular meeting on Monday, April 12, 2021 at 6:00 p.m. with the following members present:

Mayor Everette Newton presiding
Mayor Pro Tempore Charles McDonald
Commissioner Ann Carter
Commissioner John Hagle
Commissioner Sharon Harker
Commissioner Marianna Hollinshed

Others Present: Town Manager John Day and Town Clerk and Assistant to the Town Manager Allen Coleman (All other staff members will be identified appropriately below)

Mayor Newton asked Town Clerk Allen Coleman to open the meeting to the public and provide public comment instructions.

Mayor Newton called the meeting to order at 6:03 p.m., welcomed everyone in attendance, and asked Town Clerk Allen Coleman to call the roll.
Roll Call ensued.

[AGENDA APPROVAL]
A motion was made by Commissioner Hagle to approval the agenda as presented.

Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

[PUBLIC COMMENTS]
NONE

[MANAGER'S REPORT]
Manager Day said Finance Director Christi Wood, Town Clerk Allen Coleman, and himself were all neck deep in budget and preparing for the recommended budget presentation in the next couple of weeks.
Manager Day said the Town Hall lobby had planned to be open to the public today, but unfortunately the railings going into the lobby did not pass inspection.

Manager Day said a the railings would be re-fabricated this week but a definite date was not determined at this time. He said as soon as those repairs and the railings pass inspection, the lobby will be open to the public.

Commissioner Hagle asked if the railing did meet our specifications.

Manager Day said the railing did not meet state code. He said the specifications listed that the railing must adhere to all state code guidance and that it was a requirement to be granted occupancy.

Commissioner Hollinshed said an update on Orange Street was needed.

Manager Day said he would defer to Town Engineer Greg Meshaw.

Town Clerk Allen Coleman said the Town Engineer was not on the call at the present time.

Commissioner Hagle said an update on Turner Street was needed as well.

Manager Day said the last updated he received from Assistant Town Engineer Sam Bell was the pavers were anticipated today and could start on that work this week but the project overall was progressing well.

Commissioner Harker said the street sweeper was back in business and it was good to see. She requested staff to publish a street sweeping schedule so that residents would know when to move their cars.

Manager Day said he would make a note of that.

Commissioner Harker said heading south on Turner Street, the left hand turn signal at Cedar and Turner Streets needed adjustment before summertime.

Manager Day said he would contact NCDOT again and obtain a status update.

Commissioner Carter asked for an update on Paid Parking and if everything was in place and ready to go.

Manager Day said recruitment was underway for the Parking Manager and Parking Ambassador positions and everything was going as scheduled.

[ITEMS OF CONSENT]

Mayor Newton provided a recap of the consent agenda items and asked for a motion to approve the consent agenda.

A motion was made by Commissioner Hagle to approve the Consent Agenda.

Mayor Pro-Tempore McDonald said he did not understand why the two items were being voted on together and could someone explain the reasoning.

Mayor Newton said the two items being considered under consent were discussed at the March work session where the Board unanimously agreed to place these items onto the consent agenda.

Mayor Pro-Tempore McDonald said the items should separate.

Mayor Newton said usually items of consent were grouped together based on prior Board actions.

Mayor Pro-Tempore McDonald said he supported the equipment purchase in budget amendment number eight but did not support the twenty-seven cents fee increase, or any amount of an increase.

Mayor Newton said he would recommend since the Board has already agreed by consensus to put the items on consent at the prior work session that Mayor Pro-Tempore McDonald vote with a nay.

Mayor Pro-Tempore McDonald said the record should reflect his support of the HVAC equipment purchase in the budget amendment but he did not support the waste industries fee increase of 27 cents.

Mayor Newton said the record would reflect those comments.

Mayor Newton call each Commissioner by name (roll call).

Roll call ensued.

VOTE: MOTION PASSED (4-1 with Mayor Pro-Tempore McDonald dissenting)

1. Residential Solid Waste Fee Increase
The Board voted to approve a 27 cents per month increase in the Residential Solid Waste Fee; (from $19.17 to $19.44).

2. FY 2021 Budget Amendment No. 8
The Board voted to approve the budget, grant, and capital project ordinance amendment for fiscal year 2020-21, which appropriates $6,500 of General Fund balance to purchase a new HVAC unit for the Public Works Wood Shop.

[PUBLIC HEARING]

1. Text Amendment modifying the Land Development Ordinance Section 20: Special Use Permits – Case No. 21-05
The Board received the Planning Board/staff recommendation, conducted a public hearing, and considered voting to approve the staff-initiated text amendment request contingent upon no public comments being received during the required 24-hour written public comment period (deadline 9:00 a.m. Wednesday, April 14, 2021.

BACKGROUND:
Section 20: Special Use Permits, of the Land Development Ordinance, currently uses the language “public hearing.” Staff is requesting the term “public hearing” be changed to “quasi-judicial proceeding” in order to eliminate confusion between the legislative and quasi-judicial processes. Staff has consulted with the Town Attorney to ensure the request is consistent with the North Carolina General Statutes.

Kate Allen, Town Planner, presented the following PowerPoint presentation:

Slide #1



Case No. 21-05
Text Amendment
Section 20: Special Use Permits

Slide #2

Background - Decision & Hearing Types

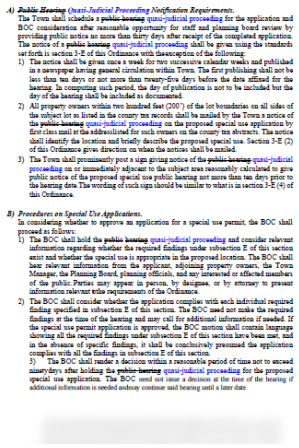
Background: "Public Hearing" has been used interchangeably for both Legislative and Quasi-judicial Proceedings

	Legislative	Quasi-Judicial
Applies to...	• Zoning Amendments • Text Amendments • Development Agreements	• Special Use Permits • Certificates of Appropriateness • Variance Requests • Appeals of Administrative Decisions
Who Can Speak?	Anyone! Not Under Oath; Time Limits Can be Imposed	Testimony Under Oath; Limited to Parties with Standing
Decision Based On...	Pleasure of the Board	Findings of Fact
Can We Talk About It?	Sure!	No! Ex Parte Communication!

Slide #3

Requested Text Amendment

Summary of Request	Text Amendment modifying language in the Land Development Ordinance Section 20: Special Use Permits.
Reason for Request	Expedite Special Use Permit Application Process (remote meetings law) & changes associated with 160D



A) ~~Public Hearing~~ *(quasi-Judicial Proceeding Notification Requirements.*
The Town shall schedule a ~~public hearing~~ quasi-judicial proceeding for the application and BOC consideration after reasonable opportunity for staff and planning board review by providing public notice no more than thirty days after receipt of the completed application. The notice of a ~~public hearing~~ quasi-judicial proceeding shall be given using the standards set forth in section 3-E of this Ordinance with the exception of the following:
1) The notice shall be given once a week for two successive calendar weeks and published in a newspaper having general circulation within Town. The first publishing shall not be less than ten days or not more than twenty-five days before the date affixed for the hearing. In computing such period, the day of publication is not to be included but the day of the hearing shall be included as documented.
2) All property owners within two hundred feet (200') of the lot boundaries on all sides of the subject lot as listed in the county tax records shall be mailed by the Town a notice of the ~~public hearing~~ quasi-judicial proceeding on the proposed special use application by first class mail at the address listed for such owners on the county tax abstracts. The notice shall identify the location and briefly describe the proposed special use. Section 3-E (2) of this Ordinance gives direction on when the notices shall be mailed.
3) The Town shall prominently post a sign giving notice of the ~~public hearing~~ quasi-judicial proceeding on or immediately adjacent to the subject area reasonably calculated to give public notice of the proposed special use public hearing not more than ten days prior to the hearing date. The wording of such sign should be similar to what is in section 3-E (4) of this Ordinance.

B) *Procedures on Special Use Applications.*
In considering whether to approve an application for a special use permit, the BOC shall proceed as follows:
1) The BOC shall hold the ~~public hearing~~ quasi-judicial proceeding and consider relevant information regarding whether the required findings under subsection E of this section exist and whether the special use is appropriate in the proposed location. The BOC shall hear relevant information from the applicant, adjoining property owners, the Town Manager, the Planning Board, planning officials, and any interested or affected members of the public. Parties may appear in person, by designee, or by attorney to present information relevant to the requirements of the Ordinance.
2) The BOC shall consider whether the application complies with each individual required finding specified in subsection E of this section. The BOC need not make the required findings at the time of the hearing and may call for additional information if needed. If the special use permit application is approved, the BOC motion shall contain language showing all the required findings under subsection E of this section have been met, and in the absence of specific findings, it shall be conclusively presumed the application complies with all the findings in subsection E of this section.
3) The BOC shall render a decision within a reasonable period of time not to exceed ninety days after holding the ~~public hearing~~ quasi-judicial proceeding for the proposed special use application. The BOC need not issue a decision at the time of the hearing if additional information is needed and may continue said hearing until a later date.

Slide #4

Planning Board Review & Requested Action

Planning Board Review
- The Planning Board reviewed the request at the March 15, 2021 Regular Meeting and unanimously recommended approval

Requested Action
- Conduct Public Hearing
- Render a decision on the request with an effective date of 9:01 a.m. Wednesday, April 14, 2021 provided no comments are received in the required 24-hour public comment period*

*If written comments are received before the 24-hour deadline (9:00 a.m. April 14, 2021), the request will come before the Board at the April 26th Work Session for further consideration

Commissioner Harker asked if going forward the Public Hearing items and Quasi-Judicial items would be separated on the agenda.

Kate Allen said once all of the 160-D updates were made to the ordinance, yes. She said as the current ordinance is written, all of the legislative items would still appear under the term public hearing.

Commissioner Harker said maybe the quasi-judicial items could be indicated in parathesis for clarity.

Kate Allen said yes.

A motion was made by Commissioner Hagle to open the public hearing.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

Town Clerk Allen Coleman said no members of the public had signed up to speak on this item.

A motion was made by Commissioner Hagle to close the public hearing.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

A motion was made by Commissioner Hollinshed to approve the staff initiated text amendment modifying the Land Development Ordinance Section 20: Special Use Permits, contingent upon no written public comments being received within the required 24-hour period (deadline 9:00 a.m. Wednesday, April 14, 2021).

Commissioner Hollinshed read the following ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO MODIFY THE LAND DEVELOPMENT ORDINACE
SECTION 20: SPECIAL USE PERMITS
ORDINANCE NO. 21-08

Applicant: Staff Initiated Request
Amendment: Modify the Land Development Ordinance Section 20: Special Use Permits by replacing the term “Public Hearing” with “Quasi-judicial Proceeding” 1

WHEREAS, the Applicant has submitted a request to modify the Land Development Ordinance Section 20: Special Use Permits; and
WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on March 15, 2021, at which time the Planning Board recommended approval of the request; and
WHERAS, the Beaufort Board of Commissioners conducted a public hearing on April 12, 2021 at which time the applicant and/or applicant’s representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and
WHEREAS, at the April 12, 2021 meeting the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with the spirit and intent of the Land Development Ordinance.
2. The proposed text amendment is consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan - Future Land Use Map.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to modify the Land Development Ordinance Section 20: Special Use Permits is approved and the Town's Land Development Ordinance is amended accordingly.

Enacted on motion of Commissioner Hollinshed and carried on a vote of 5 in favor and 0 against.
This, the 12th day of April 2021
TOWN OF BEAUFORT

_____
Everette (Rett) Newton, Mayor

_____
Allen Coleman, Town Clerk

Mayor Newton call each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

No written comments were received.

2. Modify/Revise the Existing Planned Unit Development (PUD) for Beau Coast Subdivision; Case No. 21-06

The Board received the Planning Board/staff recommendation, conducted a public hearing, and considered voting to approve the PUD modification request contingent upon no public comments being received during the required 24-hour written public comment period (deadline 9:00 a.m. Wednesday, April 14, 2021).

BACKGROUND:

The applicant wishes to modify the following standards in the PUD Booklet Dated February 22, 2021 for Beau Coast Subdivision:

- Convert a section of eight (8) 22' wide townhome lots (existing lots 119-126) to four (4) single family lots (50' wide): Net loss of four (4) dwelling units; (See Attachment – A – Vicinity Map for location of lots.)
- Convert two (2) 20 foot wide townhome lots (lots 177 & 178) to one (1) 40' wide single family lot: Net loss of one (1) dwelling unit; o Total net loss of 5 dwelling units. (See Attachment – A – Vicinity Map for location of lots.)
- Add permeable pavement specifications to the PUD document for alleys, on-street parking areas, and sidewalks as an option for use in the PUD;
- Add note regarding lot configuration options

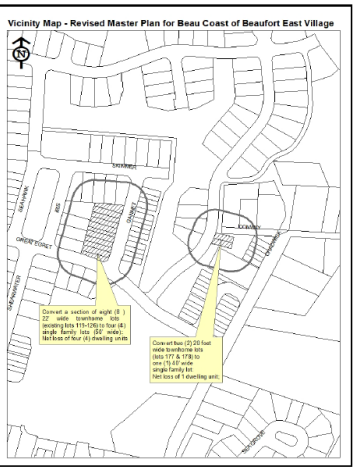
At their March 15, 2021 meeting the Planning Board unanimously recommended to Modify the PUD for Beau Coast Subdivision.

Kyle Garner, Director of Planning and Inspections, presented the following PowerPoint presentation:

Slide #1

Applicants Request

- Convert a section of eight (8) 22' wide townhome lots (existing lots 119-126) to four (4) single family lots (50' wide): Net loss of four (4) dwelling units;
- Convert two (2) 20 foot wide townhome lots (lots 177 & 178) to one (1) 40' wide single family lot: Net loss of one (1) dwelling unit; o Total net loss of 5 dwelling units
- Add permeable pavement specifications to the PUD document for alleys, on-street parking areas, and sidewalks as an option for use in the PUD;
- Add note regarding lot configuration options



Slide #2

Public Notice Information

In accordance with **NCGS 160A-384** and the **Town of Beaufort Land Development Ordinance, Public Notice** was provided via

15 - Letters Mailed to property owners included in rezoning area and those within 100 feet. Information based on Carteret County GIS.

Signs - Posted on March 30th

Legal Advertisement – Wednesday March 31st & April 7th 2021

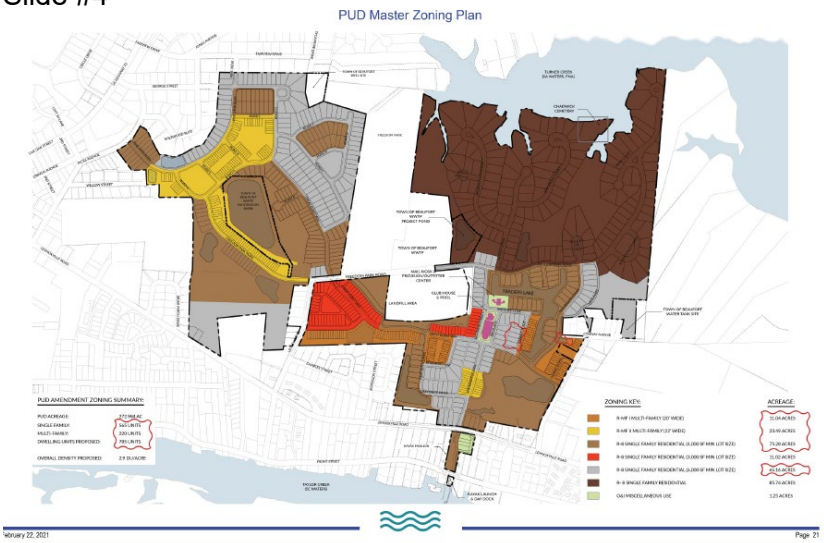




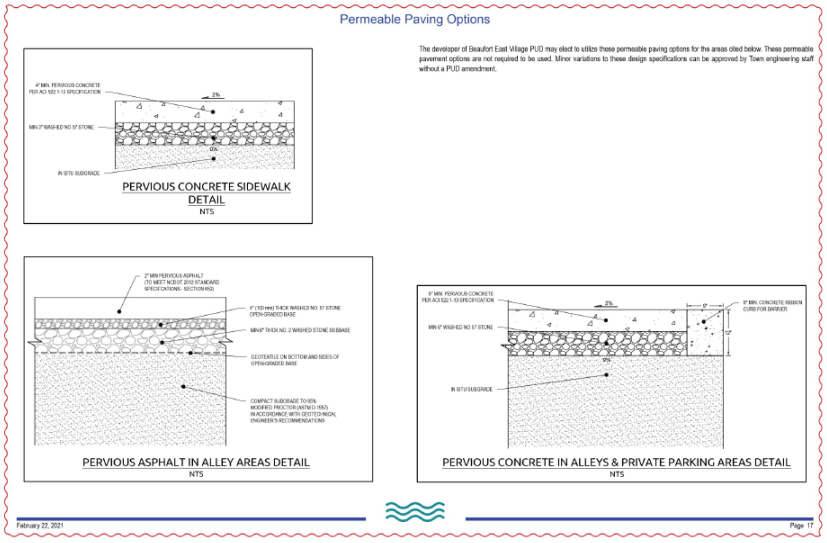
Slide #3



Slide #4



Slide #5



Slide #6

REQUESTED ACTION:

1. Conduct Public Hearing
2. Discussion on request to amend the Master Plan for Beau Coast
3. Decision to approve with the condition that if there are no comments then the request will be approved within 48 hours of the hearing or if there are comments within the 24 comment period then the decision will be made at the next Board of Commissioners workshop.
4. Consistency Statement

Consistency Statement

The Board of Commissioners must provide a consistency statement to support the request, recommend a more restrictive zoning classification, or deny the request as it relates to the surrounding land use development pattern and its relationship to the CAMA Land Use Plan.

In accordance with **NCGS § 160A-383**, the consistency statement must include one of the following:

- A statement recommending approval of the zoning amendment and describing its consistency with the CAMA Core Land Use Plan
- A statement recommending denial of the zoning amendment and describing its inconsistency with the CAMA Core Land Use Plan
- A statement recommending approval of the zoning amendment containing the following:
  - Declaration that the approval is also deemed an amendment to the CAMA Core Land Use Plan
  - An explanation of the change in conditions the board took into consideration when recommending approval

Consistency statement must <u>explain why</u> the action taken is reasonable and in the public interest

Commissioner Hagle asked who would be responsible for the maintenance of the permeable pavement long term after the project is done.

Director Garner said the Town Engineer, Mr. Karl Blackley, and their Engineers were working on the details on those areas, but the allies would be the developers and the homeowners associations responsibility. He said that language would be included in their land use documents.

Commissioner Hagle asked if special equipment was required to maintain the permeable pavement.

Director Garner said the applicant would likely contract out the work. He said because of the Town's work on Orange Street, the Town Engineer Greg Meshaw was already looking into the equipment for this maintenance.

Director Garner said the new vac-truck that was being acquired has the appropriate mechanisms to clean those type of areas. He said the key points were the dedication to the Town and accepted by the Town before the maintenance would be considered.

Commissioner Hagle asked about the sidewalks.

Director Garner said the same situation applied – if they were dedicated to the Town and accepted by the Town then they would fall under the Town's responsibility. He said right now that particular detail had not been worked out.

Commissioner Hagle asked how the developers would decide which sidewalks to use permeable pavement for.

Director Garner said that was likely a good question for Mr. Blackley, however, it would not surprise him if permeable pavers would be becoming more prevalent throughout the rest of the development. He said the developers see that as a positive for the overall stormwater system and the Town Engineering team was supportive of that as well.

Commissioner Hagle said he agreed but would like to know more about the maintenance aspects since permeable pavers will require more maintenance than regular concrete.

Mayor Newton asked if Mr. Blackley and Mr. Don Mizelle could join the call to answer any of Commissioners Hagle's questions.

Karl Blackley said his development organization was responsible for all of the private alleys. He said the only way the program works is if the permeable pavers is maintained and if the areas fill up with silt, as previously alluded to, then it doesn't work.

Karl Blackley said as a developer, they will go in and vacuum the areas effect by construction and go through an entire cleaning once the homes are built so that it will function properly. He said the responsibility of sidewalk maintenance would be on the Town, however, it is the developer's responsibility to have the permeable pavers in a form or format the Town can maintain.

Karl Blackley said as long as the permeable pavers areas are kept clean and it doesn't start out with debris, the cleaning could potentially not occur for three, four, or five years later.

Don Mizelle said in their research with permeable paver specialist, the initial construction period is when the permeable pavers will absorb the most silt and has the most problems. He said once the develop is stabilized, it is his belief that the maintenance frequency would diminish significantly over time.

Commissioner Hagle asked if Mr. Mizelle could share any other experiences from other developments and if he could explain how the process worked.

Joe Boyd said the maintenance would become more regulated after construction was completed. He said the state set requirements for the maintenance in permeable pavement areas to be inspected and maintained at least once quarterly or four times a year. He said his experience never allows him to see areas for extended periods of time and permeable pavement was relatively new concept, but his experience and research shows this is a good option.

Don Mizelle said his team met with Director Garner and Town Engineer Meshaw on several occasions and together they determined sidewalks to be the least obtrusive place to operate the permeable pavers. He said in researching options for the Orange Street project, the sidewalk route would be easiest to control and maintain long term. He said internally they were looking at alleys, parking lots, and crowded sidewalks to apply the permeable pavement formula.

Commissioner Harker asked if the Town would need to purchase the necessary equipment to maintain the permeable pavement areas.

Greg Meshaw said the plan to procure the street sweeper, which would have sufficient vacuum to vacuum permeable pavement is underway, but likely the machine would not be used on sidewalks.

Karl Blackley said other municipalities had an attachment to their street sweeper, similar to picking up leaves, but he was not aware of the Town had this equipment of functionality.

Greg Meshaw said he would research options that may be available and could certainly see where that would be a ideal approach.

Commissioner Harker said that would certainly offer a cost savings as opposed to purchasing an entirely new piece of equipment.

Commissioner Carter said she wanted to commend Karl Blackley and Beau Coast for looking at stormwater control methods.

A motion was made by Commissioner Hagle to open the public hearing.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

Town Clerk Allen Coleman said no members of the public had signed up to speak on this item.

A motion was made by Commissioner Hollinshed to close the public hearing.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

A motion was made by Commissioner Hagle to approve the Planned Unit Development (PUD) modification request for Beau Coast Subdivision, contingent upon no written public comments being received during the required 24-hour period (deadline: Wednesday, April 14, 2021).

Commissioner Hagle read the following ordinance amendment:

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO AMMEND THE PUD DOCUMENT FOR BEAU COAST & BEAUFORT EAST VILLAGE
ORDINANCE NO. 21-09

Applicant:	Withers & Ravenel, Engineers for Blue Treasure, LLC
Location:	Beau Coast & Beaufort East Village
Existing District:	PUD (Planned Unit Development)
Meeting Date:	April 12, 2021

Requested: Modification to Existing PUD Document

WHEREAS, the Town of Beaufort Planning Staff has submitted a request to modify the existing PUD for Beau Coast and Beaufort East Village: and
WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on March 15, 2021, at which time the Planning Board recommended approval of the request; and
WHERAS, the Beaufort Board of Commissioners conducted a public hearing on April 12, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and
WHEREAS, the Town Board of Commissioners has made the following findings and conclusions:
1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed changes of the PUD are consistent with the spirit and intent of the ordinance and the CAMA Core Land Use Plan.
NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to amend the PUD for Beau Coast and Beaufort East Village be approved and the PUD Booklet for Beau Coast & Beaufort East Village be amended accordingly.

Enacted on motion of Commissioner Hagle and carried on a vote of 5 in favor and 0 against.

This, the 12th day of April 2021
TOWN OF BEAUFORT

_____
Everette (Rett) Newton, Mayor

_____
Allen Coleman, Town Clerk

Mayor Newton call each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

No written comments were received.

Mayor Newton asked if the Town Engineer could provide an update on Orange Street.
Town Engineer Greg Meshaw said a proof roll was scheduled for 9:00 a.m. tomorrow morning on Orange Street. He said a proof roll is where they take a loaded dump truck and basically run it up and down the street to make sure they do not see any places where the sub grade, that will support the pavement, will give way. He said there is not indication the proof roll will not pass and once this process occurs the contractor plans to begin paving.
Commissioner Hagle asked for an update on Turner Street.
Engineer Meshaw said the work along side the businesses should be completed by the end of this month. He said as long as the weather cooperates, he doesn't foresee any changes to that schedule.
Commissioner Harker asked for more explanation on the work taking place at Cedar Street and Queen Street.
Engineer Meshaw said this area was effected by the water and sewer line repair work. He said there was an issue with the stormwater line in that area as well and a conflict box had to

be added. He said a conflict box is a big box where stormwater pipes enter and the water goes into the box as a blind pipe for the sewer or water, whatever the conflict is.

Commissioner Carter said if other streets decide to take as long as Orange Street perhaps the Board would consider not doing them or have a tighter schedule for completion.

Engineer Meshaw said their was quite a lot of work that needed to occur on Orange Street and there were some breaks in the work. He said the project may have been completed sooner if the breaks were not as staggered.

Engineer Meshaw said the scope of the Orange Street project included replacing the waterline, replacing the storm water line, replacing the sewer line and there was not only pavement there but concrete underneath the pavement and several unexpected items occurred. He said anytime a project included old infrastructure, unexpected items would occur naturally.

[ITEMS FOR DISCUSSION AND CONSIDERATION]

1. Final Plat – Beau Coast Phase V – Case No. 21-07

The Board discussed an applicant-initiated request to sub-divide a 15.31-acre tract into 86 lots (49 Single Family Residential Lots and 37 Townhome Lots).

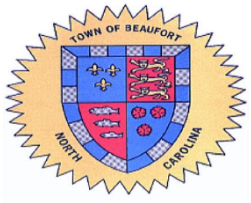
Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:

The applicant wishes to subdivide a 15.31 acre tract into 86 lots (49 Single-Family Residential Lots & 37 Townhome Lots). In addition to Planning Staff the Town Engineer and applicants Engineer will also be available to answer questions regarding the proposed infrastructure.

Kyle Garner, Director of Planning and Inspections, presented the following PowerPoint presentation:

Slide #1



Final Plat
Beau Coast – Phase V

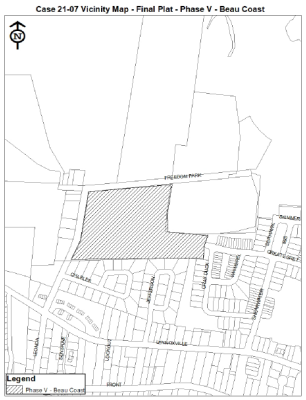
Slide #2

- **Location:** Leonda Drive & Freedom Park Drive
- **Request:** Subdivide a 15.31 Acre Tract into 86 Lots (49 Single-Family Lots & 37 Multi-Family Lots)

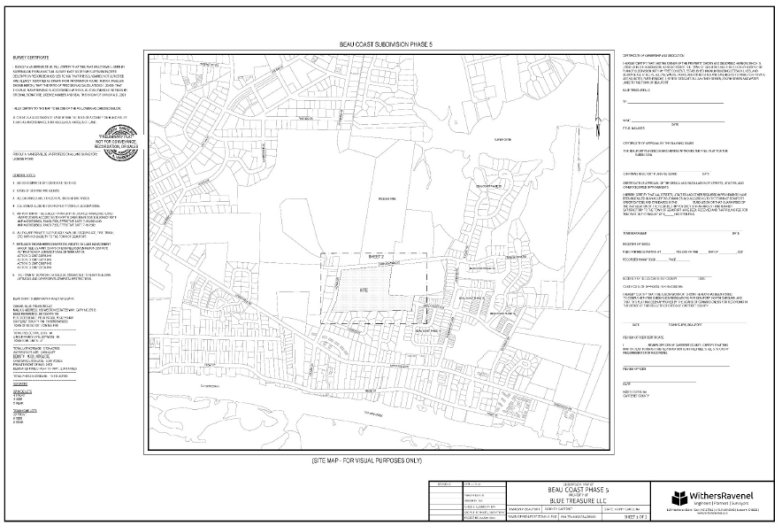
Acreage: **15.31** Acres

Amount of Wetlands: .17 Acres

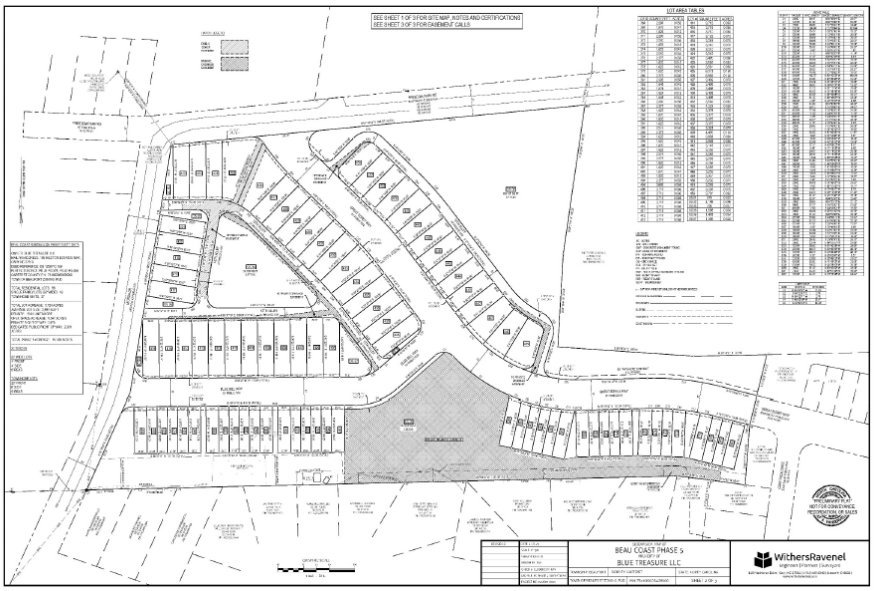
Amount of Open Space: 6.347 Acres



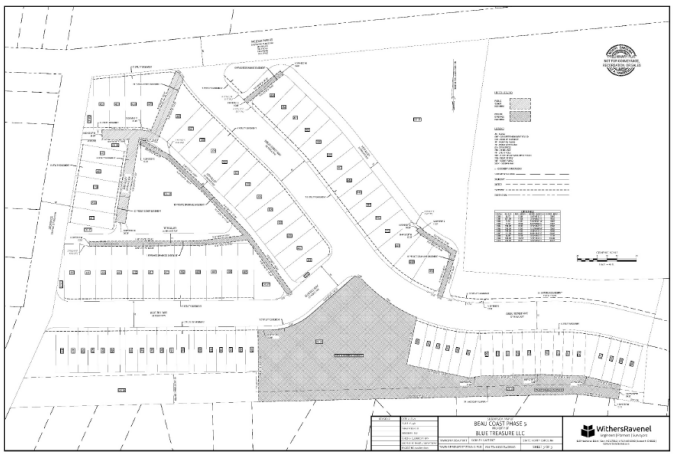
Slide #3



Slide #4



Slide #5



Commissioner Hagle said the materials mentioned pervious surfaces and asked if this would be similar to the previous discussions. He said his assumption would be they would use this on some alleyways or sidewalks.

Director Garner said yes. He said it worked out well tonight to have the modification requests before this item, but the intention was to use permeable pavement in these areas as well.

Commissioner Hagle asked for explanation on the difference between public and private easements.

Director Garner said public easements is for anyone who wants to use and a private easement is either for folks who live in the development or someone like the Town.

Commissioner Hagle said the areas around the pond are listed as private easement.

Director Garner said that was correct as that area is under the ownership of the homeowner's association and they were responsible fort he easements in this area.

A motion was made by Commissioner Hagle to approve the applicant's request to subdivide a 15.31-acre tract into 86 lots (49 Single Family Residential Lots and 48 Townhome Lots).

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

2. Preliminary Plat – Beaufort East Village Phase 1 – Case No. 21-08

The Board discussed an applicant-initiated request to subdivide a 41.79-acre tract into 108 lots (60 Single Family Residential Lots and 48 Townhome Lots).

Kyle Garner, Director of Planning and Inspections, presented the following information:

BACKGROUND:

The applicant wishes to subdivide a 41.79 Acre Tract into 108 Lots (60 Single-Family & 48 Townhouses). In addition to Planning Staff the Town Engineer and applicants Engineer will also be available to answer questions regarding the proposed infrastructure.

At their March 15, 2021 meeting the Planning Board recommended unanimously to approve the Preliminary Plat.

Kyle Garner, Director of Planning and Inspections, presented the following PowerPoint presentation:

Slide #1

Preliminary Plat
Beaufort East Village
Phase I

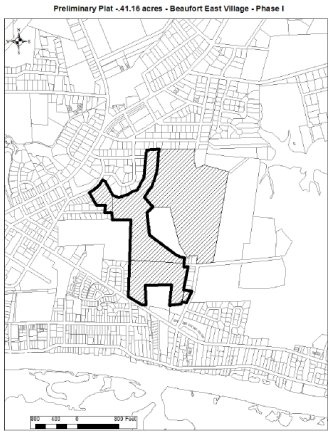
Slide #2

- **Location:** Ricks Avenue, George Street & Leonda Drive
- **Request:** Subdivide a 41.79 acre tract into 108 Residential Lots

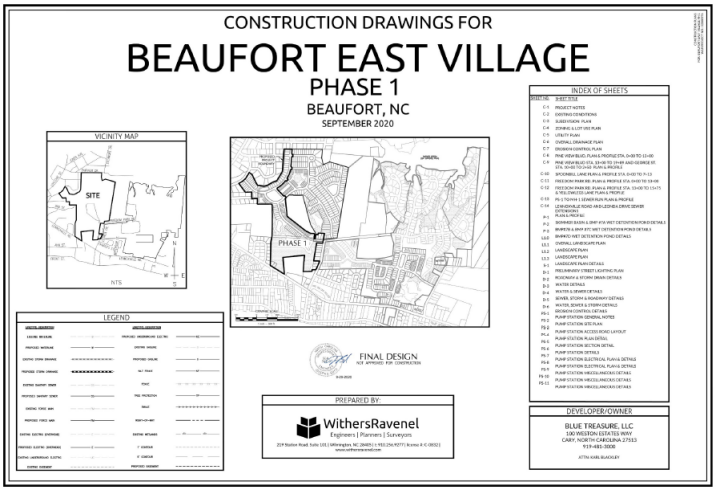
Amount of Open Space: 23.02 Acres

Amount of Recreation Area: 1.58 Acres

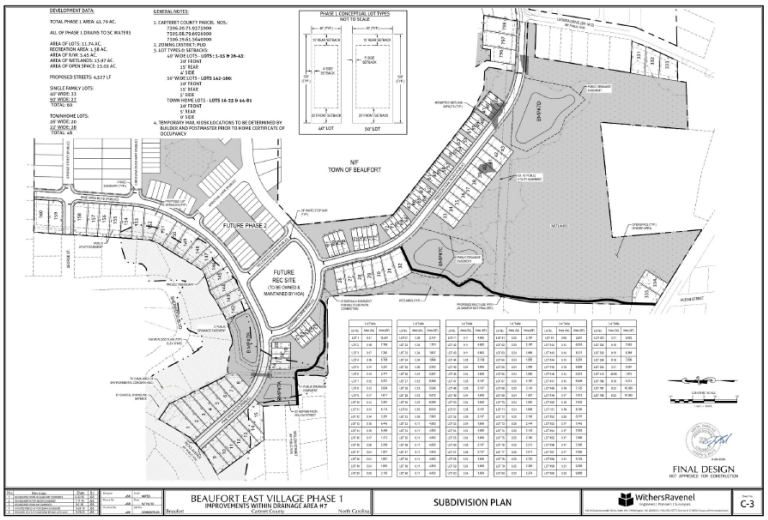
Amount of Wetlands: 13.97 Acres



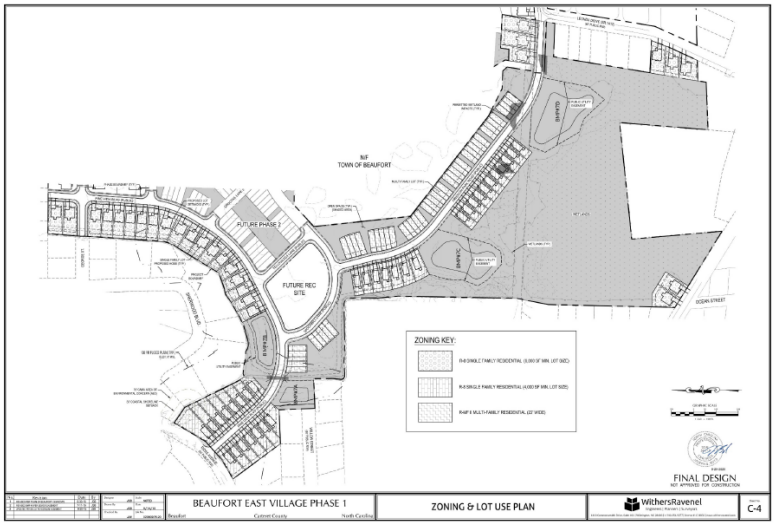
Slide #3



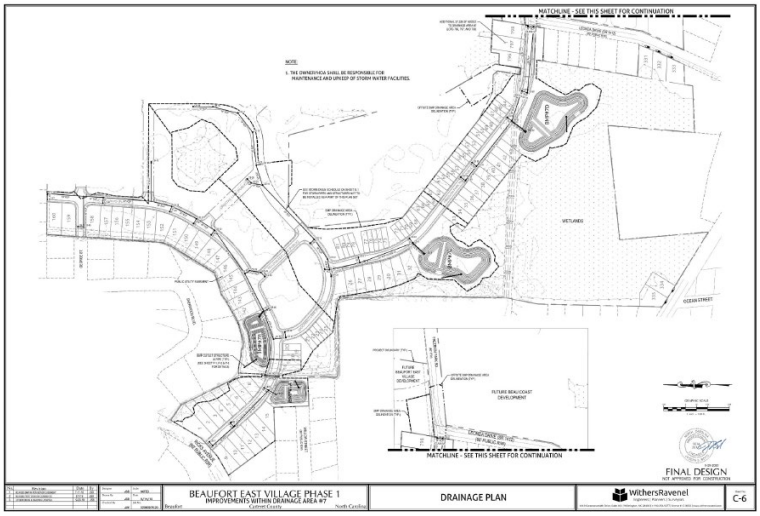
Slide #4



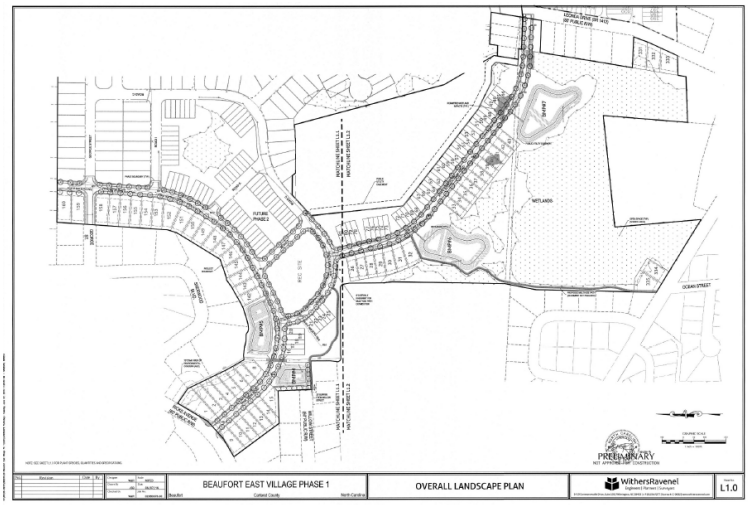
Slide #5



Slide #6



Slide #7



Commissioner Hagle said he would like a review of the BNP drainage and where they go to and asked if we could check the capacity of the downstream of these with the discharge of the ponds. He said particular the buffering along the lots that are adjacent to the Sherwood Boulevard lots.

Director Garner asked if that was request or a question.

Commissioner Hagle said he would like to know where these pumps drained to and if the capacity downstream was adequate to handle the discharge from these ponds.

Joe Boyd said this section of the development is discharged to Town Creek not Taylors Creek. He said Beau-Coast phase one and phase five all go to Taylors Creek, but this development would go through a wetland area, a large ditch, then deposit into Town Creek, and this would not effect those on the Beau-Coast side. He said tests had been completed to meet all town and state regulations for all four ponds.

Commissioner Hagle asked if their was any buffering between the lots on Sherwood Boulevard.

Joe Boyd said there was no buffer but there was an easement.

Commissioner Hagle asked how large the area was between the two lots.

Joe Boyd said approximately 20 feet.

Commissioner Hagle asked if the homeowners' association was responsible for maintaining the stormwater facilities, including the ponds, and if there was a force main pump in this area, too.

Joe Boyd said yes, and there was a sewer pump stage proposed in this phase.

Commissioner Harker asked if the trails that are leading within this neighborhood could be accessed by anyone.

Director Garner said yes.

Commissioner Harker said that means anyone can walk the trail within that area.

Commission Harker said to clarify the recreational facilities outside would be for individual use from outside patrons.

Director Garner said his understanding was, yes, anyone would be able to use the recreational facilities. He said the pool would not be for general public use.

Commissioner Hagle asked if more explanation could be give on the lot labeled as 42 acres.

Joe Boyd said that was the remaining open space and not a lot.

Mayor Newton said if the stormwater is going to flow westbound down to Town Creek verses eastbound to Taylor's Creek then he would need to followup with Greg Meshaw. He said the Board had not stressed the culverts underneath Live Oak Street to really determine if they were designed to handled that much extra stormwater discharge. He said it gets lost on people that Beaufort is bisected by this marshland that goes from Town creek all the way over to Turner Creek.

Commissioner Hagle said additional information needed to come before the Board on the 100 year storm event calculations.

Don Mizelle said the recreational facilities were not open for public use in Beaufort East Village, but the walking trails were open for public use.

A motion was made by Commissioner Hagle to approve request to subdivide a 41.79-acre-tract into 108 lots (60 Single Family Residential Lots and 48 Townhome Lots).

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

3. Beaufort Harbor and Waterways Master Plan (BHWMP) Advisory Committee

The Board discussed the charge and composition for the proposed Beaufort Harbor and Waterways Master Plan Advisory Committee (BHWMP).

John Day, Town Manager, presented the following information:

BACKGROUND:

As discussed at the February 2020 Town Board retreat, a comprehensive harbor and waterways master plan is needed to address water quality, harbor management, the expiration of the current Beaufort Docks and National Park Service leases in 2024, the possible development of a mooring field, and how such items impact the timing of the replacement of the Front Street bulkhead and boardwalk.

At this year's Town Board retreat it was decided that an advisory committee should be appointed to assist in the effort. This committee will engage the public and work with the town's staff and consultant to advise the Board of Commissioners during the formation of a Beaufort Harbor & Waterways Master Plan.

The Board also discussed preparation of an updated application for appointments to boards and committees, including a question related to applicants' "connection" to Beaufort. There was consensus that there should not be a residency requirement for all appointees to this committee, and that there should be full disclosure of any potential financial implications for members.

At the March 22, 2021 Virtual Work Session, the Board recommended the Beaufort Harbor & Waterways Master Plan Advisory Committee be comprised of six members, with the term limits being set for the duration of the project. The Board unanimously agreed to follow the normal process for advertisement, recruitment, and appointment of the six new/vacant positions. In addition, the Board directed staff to begin working with Moffit and Nichols on a consulting contract.

A revised description of the committee' background, charge, and composition is attached.

Commissioner Hagle said the scope of the committee seemed large and he was concerned the committee would not be able to accomplish all of the items listed. He said the Board may want to consider appointing an Commissioner to service on this ad-hoc committee. He said a timeline should be included and a progress reporting timeline should be incorporated so the Board is up-to-date with the committees progress.

Manager Day said progress reports could be provided at each work session or quarterly similar to the project updates, but it was up to the Board to advise how frequent they would like to receive those updates. He said the plan was for the plan to be completed by the end of fiscal year 2022.

Commissioner Hagle said he would recommend that completion date.

Mayor Newton said as a reminder their was a generous benefactor who has offered ten thousand ($10,000) for a group to travel to similar communities to gather lessons learned then report back to the committee.

Commissioner Hollinshed said she supported the items Commissioner Hagle mentioned and also would like to see a more defined and narrow scope and build components onto those elements. She said a Commissioner needed to be on the committee to help with reporting back to the Commissions so there was open communication and regular updates.

Mayor Newton said the Board's work session agendas could be tweaked to include an update under the project updates header. He said this would work similar to when the Board received bridge opening updates.

Commissioner Harker said of the six proposed positions a definition needed to be incorporated on whether outside applicants would be considered. She said since this is a Beaufort project preference should be given to Beaufort residents but perhaps a ETJ member or two could be appointed while the other members are in-town.

Commissioner Harker said the length of the scope is concerning and while there are a lot of items listed that need to be unpacked, she would prefer to keep the scope broad. She said some items affect others and the committee may need that flexibility as they are planning and fitting together the many pieces.

Commissioner Harker said updates are critical but did not see a need to have a Commissioner as an ex-officio member. She said all of the meetings were open to the public and any Commissioner is able to attend.

Commissioner Carter said the outline was far too excessive and the committee could be overwhelmed trying to deal with black and grey water or others. She said she did not anticipate the committee being completed by the end of the fiscal year but rather it functions for a period of time on certain elements of priority until the plan is fully complete.

Commissioner Carter said she was not concerned about committee members being local or outside of town if they provided the expertise that would help this committee be successful. She said she strongly supported selecting an ex-officio Commissioner as a member of this committee.

Mayor Newton said this was a real opportunity to look holistically at our waterways and black and grey water would not be daunting task. He said several other communities had dealt with this issue and this is not be the only limitation of this committee as the Town works towards a clean water coastal community.

Mayor Newton said the Board had somewhat of consensus around having an ex-officio Board member on this community. He asked if any additional revisions were needed to the proposed scope.

Commissioner Hagle said a timeline needed to be incorporated into the committee's plan.

Commissioner Carter said the Board was not involved in the development of the proposed elements of the new committee. She said the dock lease didn't expire until 2024 and

was not clear why the plan for implementation was being rushed for completion at the end of fiscal year 2022.

Mayor Newton said this document was included in several agenda packages.

Commissioner Carter said she did not agree with those versions either and the Board had been very minimally involved in the prioritize of the work for this committee.

Mayor Newton asked what items needed to be removed.

Commissioner Carter said waterway quality was an ongoing issue and should be included in all of the Town's plans but not a primary citation. She said black and grey water was not a primary concern as their were other higher and more pressing elements. She said all of the items included within the list are important but the prioritization order was critical so the committee understands the Boards critical need for this committee.

Manager Day said he understood the perception that some of the items listed had a higher priority so the Board may want to indicate which of these items should be addressed first by the committee as opposed to letting them have free range.

Commissioner Hagle said he saw this committee having two major focuses in the beginning the remaining could be incorporated in as the committee progressed.

Commissioner Hollinshed said the Board needed to prioritize different elements of the Committee especially if items have more of a timeliness about them.

Mayor Newton said he understood the comments of the Board but asked to not lose this opportunity to look holistically. He said there were constant problems in Town Creek after storms.

Commissioner Carter said more discussion on this needed to occur at the next work session.

Commissioner Hollinshed said the process to collect quality applicants may take longer than this discussion but the committee should be comprised on individuals with expertise regardless of their living location. She said individuals who have cruised our waterways and know Beaufort would be ideal.

Mayor Pro-Tempore McDonald said the plan should be comprehensive and include how Beaufort needs and wants over the next five years or so. He said he was not as concerned with the prioritization of the various reporting elements, but they were all important.

Commissioner Harker said the committee being discussed was a Beaufort Harbor and Waterways Master Plan Advisory Committee and the elements were essentially two major projects. She said the items being discussed were not placed in a numerical order of importance but rather a list of discussion points to be considered during the compilation of the master plan.

Commissioner Harker said she agreed with Commissioner Carter that the Board may want to provide firmer detail to the committee on what the priority items were but that each of the elements would overlap at some point.

Mayor Newton said this committee was critical in the future of Beaufort and the proper guidance was needed at the very beginning for this committee to be successful.

Manager Day asked if the recruitment for this Committee could begin.

The Board did not vote but agreed to begin advertisement of the newly created Beaufort Harbor and Waterways Master Plan Advisory Committee positions.

[MAYOR/COMMISSIONER COMMENTS]

Commissioner Hagle said he appreciated all of the work Greg and his team were doing on the streets and all over town. He said anytime infrastructure had to be completed in an old town areas of concern would pop up.

Commissioner Hagle said he enjoyed the pre-meeting music and the communications provided by the Town Clerk Allen Coleman pre and post meetings. He said thank you to the employees in the police department, fire department, public utilities department, and public works department. He said those folks provide a great deal of support to our citizens each and every day and their dedication was commended and their positive attitudes were appreciated.

Commissioner Hagle said his safety message was related to safety at home and safety on the highways. He said spring time was here and be careful using ladders and other power tools around the house. He said focus on your driving and stay safe. He said it's always good to keep a clear distance between your vehicle and others.

Commissioner Hollinshed said the Town had been extremely busy over the past two weeks with easter break and spring break for schools and the merchants seemed to be supportive.

Commissioner Hollinshed said Carteret County had released a memo today that COVID-19 shots would cease as of the 30th and encouraged everyone to go to a nearby clinic and be vaccinated.

Commissioner Hollinshed said the Beaufort Farmer's Market reopened this coming Saturday and for patrons to wear a masks and support those local vendors.

Mayor Pro-Tempore McDonald said he hoped the Board would do everything in their power to keep the charm of Beaufort alive and well.

Commissioner Harker said a public meeting was held last month to discuss Beaufort's Comprehensive Plan and said thank you to Town Planner Kate Allen and Stewart for a fabulous job facilitating that session. She said the breakout sessions during the public meeting were wonderful and another survey was ending tomorrow.

Commissioner Harker said April 22nd was Earth Day. She said when we take care of the Earth, the better the earth is able to take care of us.

Commissioner Harker said thank you to the Parks and Recreation committee as well as Back Street Pub for joining in the Carteret Big Sweep. She said this group would be cleaning up the public access along front street to help keep the waterways free of debris.

Commissioner Harker said thank you to Town Clerk Allen Coleman for the jewels being left around Town. She said for those that had not noticed, a color calendar of the board's meeting schedule had been published and was very easy to read.

Commissioner Harker said even though the vaccine clinics were closing down this did not mean the opportunity to get a shot was closed. She said most likely your local physician would have a supply and check with your primary care facility.

Commissioner Carter said she would be working the vaccination clinics in May so the dates may be revised.

Commissioner Carter asked if Town Hall was fully staffed.

Manager Day said not every day, but the staff that was required to be there each day was.

Commissioner Carter asked when Town Hall would be opened and fully staffed.

Manager Day said as soon as the lobby reopened staff would resume being on site.

[CLOSED SESSION]

Pursuant to North Carolina General Statutes § 143-318.11 (a)(3) "to consult with an attorney retained by the Board in order to preserve the attorney-client privilege between the attorney and the Board"

A motion was made by Commissioner Harker to enter into closed session at 7:28 p.m.

Mayor Newton called each Commissioner by name (roll call).

Roll call ensued.

VOTE: UNANMIOUS (5-0)

Town Clerk Allen Coleman asked for a pause to remove any unauthorized individuals from the closed session and to stop the live streaming to Facebook.

A motion was made by Commissioner Harker to return to open session at 8:40 p.m.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

Mayor Newton said the Town had been presented with two lawsuits labeled Queen Street Priorities and the other O'Neal.

A motion was made by Commissioner Hagle to authorize the attorney's to make an offer of up to $15,000 for the O'Neal case.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANMIOUS (5-0)

[ADJOURN]

A motion was made by Commissioner Harker to adjourn the meeting.
Mayor Newton called each Commissioner by name (roll call).
Roll call ensued.

VOTE: UNANIMOUS (5-0)

The meeting adjourned at 8:43 p.m.

_____
Everette "Rett" Newton
Mayor

_____
Allen Coleman
Town Clerk

Town of Beaufort, NC

701 Front St. – P.O. Box 390 – Beaufort, N.C. 28516
252-728-2141 – 252-728-3982 fax – www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Items of Consent

SUBJECT: FY 2022 Budget Amendment No. 1

BRIEF SUMMARY:

General Fund
This amendment requests the appropriation of fund balance of $250,440 for projects and professional services budgeted in FY21 but not completed prior to June 30, 2021. Projects and services include:

- Public Works- Topsail Park Garden Project ($7,540), Dredge ($85,000)
- Planning – Design Guidelines ($7,500) CAMA & UDO ($95,100)
- Non- Departmental – ADA plan ($10,300) Harbor Management Plan ($45,000)

Utility Fund
This amendment requests the appropriation of fund balance of $105,579 for purchases that were budgeted in FY21 but not received prior to June 30, 2021. These include:

- Sewer - Ford F750 ($79,534) Equipment Trailer ($13,920), Sewer AIA Project ($11,125)

REQUESTED ACTION:

The Manager recommends the Board approve the budget amendment number one (1) which allocates funds for various projects and professional services not completed in FY21 in both the general fund and the utility fund.

EXPECTED LENGTH OF PRESENTATION:

5 minutes

SUBMITTED BY:

Christi Wood
Finance Director

BUDGET AMENDMENT REQUIRED:

Yes

TOWN OF BEAUFORT
FY 2022 BUDGET AMENDMENT #1

WHEREAS, the Town of Beaufort adopted its Fiscal Year 2022 Budget through Ordinance on June 14, 2021, and

WHEREAS, the Board of Commissioners recognizes that periodic modifications to the estimated revenues and expenditures for the fiscal year may be necessary for fiscal management purposes and to implement decisions of the Board of Commissioners;

BE IT THEREFORE ORDAINED that the Board of Commissioners amends the Fiscal Year 2022 Budget as follows:

SECTION I: GENERAL FUND

This amendment requests the appropriation of fund balance for projects and professional services budgeted in FY21 but not completed prior to June 30, 2021. Projects and services include:

- Public Works- Topsail Park Garden Project ($7,540), dredge ($85,000)
- Planning – Design Guidelines ($7,500) CAMA & UDO ($95,100)
- Non- Departmental – ADA plan ($10,300) Harbor Management Plan ($45,000)

A. REVENUE

INCREASE

APPROPRIATED FUND BALANCE	$ 250,440
TOTAL INCREASE	**$ 250,440**

B. EXPENDITURES AUTHORIZED BY DEPARTMENT

INCREASE

PUBLIC WORKS	$ 92,540
PLANNING DEPARTMENT	$ 102,600
NON-DEPARTMENTAL	$ 55,300
TOTAL INCREASE	**$ 250,440**

SECTION III: UTILITY FUND

This amendment requests the appropriation of fund balance for equipment services that were budgeted in FY21 but not completed prior to June 30, 2021. These include:

- Sewer - Ford F750 ($79,534) Equipment Trailer ($13,920), Sewer AIA Project ($11,125)

A. REVENUE

INCREASE

APPROPRIATED UNRESTRICTED FUND BALANCE	$ 104,579
TOTAL INCREASE	**$ 104,579**

B. EXPENDITURES AUTHORIZED BY DEPARTMENT

INCREASE

SEWER DIVISION	$ 104,579
TOTAL INCREASE	**$ 104,579**

SECTION VI: DISTRIBUTION

Copies of this ordinance shall be furnished to the Town Manager and Finance Officer to be kept on file for their direction in the disbursement of funds.

Adopted this 9th day of August, 2021

ATTEST:

Allen Coleman	Everette S. Newton
Town Clerk	Mayor

Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Items for Discussion and Consideration

SUBJECT: Town Manager Search Contract with Mercer Group Associates

BRIEF SUMMARY:

On Wednesday, July 28, 2021, the Town Manager announced his plans for retirement to the Mayor and Board of Commissioners, effective in December, 2021.

At the recommendation of the Town Manager, the Mayor and Board of Commissioners directed the Town Manager to solicit a recruitment proposal from Mercer Group Associates for the Board's consideration.

Mercer Group Associates is a national executive recruitment firm specializing in local government, with extensive experience in North Carolina in particular. Mercer Group Associates recently managed the town manager recruitment process for the Town of Emerald Isle, and is currently engaged by the Town of Edenton for its town manager search.

The total proposal is not to exceed $22,500. ($18,500 professional services fee, plus reimbursable expenses not to exceed $4,000).

Ellis Hankins, Senior Associate with Mercer Group Associates, will present the proposal.

Attached is the proposal and budget amendment.

REQUESTED ACTION:

Approval of contract and associated budget amendment.

EXPECTED LENGTH OF PRESENTATION:

10 minutes

SUBMITTED BY:

John Day, Town Manager

BUDGET AMENDMENT REQUIRED:

Yes

Town of Beaufort, North Carolina

Proposal for Executive Search Services: Town Manager

July 31, 2021

Proposed Lead Consultant and Project Manager:
S. Ellis Hankins
Senior Associate
Mercer Group Associates
Raleigh, NC
ellis.hankins@gmail.com
Cell & text: 919-349-8988

MERCER GROUP ASSOCIATES

MERCER GROUP ASSOCIATES

Reddish Executive Search Associates, LLC

Reply to:
Raleigh Office
S. Ellis Hankins
Senior Associate
1201 Little Lake Hill Drive
Raleigh, NC 27607
ellis.hankins@gmail.com
Cell & text: 919-349-8988

July 31, 2021

VIA E-MAIL: j.day@beaufortnc.org

The Honorable Rett Newton and Commissioners
c/o John Day, Town Manager
Town of Beaufort
701 Front Street
Beaufort, NC 28516

Re: Summary Proposal for Consultant Services – Town Manager Recruitment

Dear Mayor Newton and Commissioners:

We are pleased to submit this proposal to assist the Board of Commissioners in recruiting nationally and actively, with a strong focus on North Carolina, and attracting strong candidates for consideration for the position of Town Manager.

The Mercer Group, Inc. has extensive experience in conducting city and town manager searches in North Carolina and nationally, from large cities and urban counties to small towns and rural counties, with successful results. We also have assisted with fifteen state municipal league executive director searches—including the NC League of Municipalities (Jim Mercer, 2013) and most recently the Vermont League of Cities and Towns (Ellis Hankins and Jim Miller)—and several county association and public risk pool searches.

We offer an experienced lead consultant and project manager who is very familiar with our North Carolina municipalities and the public management profession: S. Ellis Hankins, Senior Associate, Raleigh, NC; assisted by other members of the firm as necessary and appropriate.

We believe our firm is well qualified to assist with this search. My 39 years of work experience and close association with North Carolina municipal elected officials and managers as a state municipal league executive director and staff member, an attorney in private practice working primarily on local government issues, a visiting professor teaching in public policy and management programs at three universities, and a public sector consultant, have given me valuable insights into municipal operations and needs, and allowed me to develop strong relationships with many professional city and county managers.

The Mercer Group, Inc. (GA corporation) has operated as the largest and most active nationwide public sector search firm for several decades, with offices in North Carolina and 10 other states. James L. Mercer, the firm's founder and President/CEO, started out as an assistant city manager with the City of Raleigh, and became the dean of the public sector consulting profession.

Please note that some internal reorganization is underway within our consulting firm, following the recent death of Jim Mercer, at age 84. We have not missed a beat while the Mercer family focuses on estate administration and related matters. Accordingly, we are pleased to offer the proposed agreement at the end of this proposal, between the Town and Reddish Executive Search Associates, LLC, also a Georgia corporation, doing business as Mercer Group Associates. The agreement will be executed by Ellis Hankins, with full authority. The consultants who are members of Reddish Executive Search Associates, LLC also are members of The Mercer Group, Inc. Alan Reddish is the highly respected retired Manager of the Athens-Clark County Unified Government, in Georgia. The proposed agreement incorporates this proposal.

Engaging the services of an executive search firm enables the Board to seek out and recruit experienced candidates who might not otherwise apply, and select a highly qualified professional manager who meets the carefully developed profile and identified needs. Beyond strengthening and diversifying the field of applicants, there are intangible benefits from placing the coordination and administration of the manager search outside Town Hall. Our nationwide network allows us to extend our active recruiting efforts broadly, but focused on your needs.

Thank you all for your consideration, and we will be pleased to assist the Board with your Town Manager search. Please let us know if you have questions or need additional information.

Sincerely yours,

MERCER GROUP ASSOCIATES

Ellis Hankins

S. Ellis Hankins
Senior Associate

MERCER GROUP ASSOCIATES

Reply to:
S. Ellis Hankins
Senior Associate
1201 Little Lake Hill Drive
Raleigh, NC 27607
ellis.hankins@nclm.org
Cell & text: 919-349-8988

EXECUTIVE SUMMARY
BEAUFORT TOWN MANAGER SEARCH

We propose an interactive and confidential search process, with abundant time early in the process for us to assist the Mayor and Board of Commissioners in defining the background, qualifications, experience and characteristics that you desire in the next Beaufort Town Manager, to guide the search.

Work Plan

We recommend an orderly multi-step search process:

- **Position Analysis** – We will work closely with the Mayor and Commissioners, including discussion in a Board meeting, ideally with a public hearing, to define minimum qualifications and requirements, and desired characteristics and experience (the "position profile"). We will meet with department directors to seek their input, and also will talk with interested citizens identified by the Mayor and Commissioners.
  One work product will be a detailed, attractive recruitment brochure to be sent to potential candidates. Please see the **attached** copy of the recruitment brochure that our proposed lead consultant developed for the Emerald Isle Town Manager search (2018).
- **Recruitment Process** – We will recruit regionally and nationally, but focused on North Carolina; place position announcements in/on cost-effective and relevant websites, social media and print media, to make the availability of the position widely known to managers and potential applicants; and employ the firm's extensive network and professional relationships to identify well qualified, potentially suitable candidates and encourage them to consider applying. We will take active recruiting steps to help assure that we attract a strong and well diversified group of candidates for consideration by the Board.
- **Resume Review & Candidate Screening** – We will receive and manage all applications. By careful analysis of resumes, internet searches and other available information, and extensive telephone or video conversations, we identify the applicants with the strongest apparent qualifications, in terms of background and experience, consistent with the stated criteria and minimum requirements.
  If desired, for a modest additional fee, we also can administer assessment instruments to give the Board additional insights into candidates' management style and emotional intelligence. We prefer to use those assessment instruments later in the process with semifinalists only, if at all, with the results to be considered by the Board as one more piece of relevant information.

- **Background Investigation** – We will conduct preliminary investigations before we discuss well qualified candidates with the Board in the semifinalists selection meeting. Then we will complete comprehensive background checks on selected semifinalists before the interviews, to avoid surprises (preliminary and final reference checks, credit and criminal record checks, verification of work history and educational credentials, etc.).
- **Semifinalists Selection** – We will present a recommended list of approximately eight to 12 candidates (or more, depending on the quality of the candidate pool) to be considered for an interview, with comprehensive information on each from the resume review, screening and background investigations, in a concise and useful format (see **attached** sample). We will help the Mayor facilitate a focused discussion and assist the Board in narrowing the field to approximately five to seven semifinalists for interviews.
- **Interview and Decision-Making Process -** We will provide additional information about semifinalists (see the **attached** supplemental questions we usually send to candidates), potential interview questions and evaluation forms (see **attached** sample), and coordinate the Board's interview process. We will help facilitate Board evaluation of the interviewed finalists. Particularly if the Board decides to conduct a second interview with one or two finalists, we will talk with additional references.
  We recommend that the Board conduct initial candidate interviews face to face, with the candidates and consultant physically present. But certainly we have had abundant experience with virtual meetings this past year, including candidate interviews, and that is an acceptable alternative if the Board prefers, depending on circumstances. Sometimes the governing body, particularly in larger cities, prefers to invite the finalists to participate in a moderated public forum and receive comments from community leaders and interested citizens before making a final decision. A less formal version of that is participation by a small citizen review panel (High Point, NC recently).
  We do not advocate for or against including that step in the process, and NC law allows the names of candidates to remain confidential through the end of the process. However, we have experience in designing and implementing sound alternatives, and can advise about best practices.
- **Lack of viable candidate** – If the process does not produce a desirable candidate acceptable to the Board (a rare occurrence, in our experience), and if it is the Board's wish that we do so, we will re-open the search process and initiate a more vigorous and creative recruitment process to identify and encourage other well qualified candidates to consider applying for consideration. See our guarantees below.
- **Negotiation and Follow-up** – We will use our extensive experience and available information (such as salary and benefits comparisons and analysis) to assist in developing an offer of employment and negotiating terms of employment, based on the Board's directions. If desired, we will work with your Town Attorney on an employment agreement with the selected candidate, and otherwise facilitate and assist with the transition. We will notify other applicants, although the Mayor might wish to notify finalists who were not selected, with our assistance.

Proposed Lead Consultant & Project Manager: S. Ellis Hankins, Senior Associate, Raleigh; assisted by other members of the firm as necessary and appropriate, particularly with respect to active recruiting. We will work on this search project primarily from our Raleigh office.

Timeline: Our proposal includes a detailed proposed search timeline, for the Board to alter as you see fit and then approve. The process will require just over 100 days after award of the contract, to the final selection and completed negotiations with the selected candidate. This proposed timeline gives us adequate time to thoroughly vet the strongest candidates, with reference and background checks. The process also could require more time if there is difficulty scheduling meetings and interviews, if the Board conducts second interviews or a public forum or citizen review panel, if no desirable candidate is found in the initial candidate pool, or if negotiations about terms of employment require more time or are unsuccessful. If the selected candidate is currently employed, probably he or she would not be able to begin work for another 30 days, or more, after execution of an employment agreement.

Fees and Expenses:
We propose a fee of $18,500 for professional services, plus actual expenses not to exceed $4,000 (which we expect to be less, based on prior experience; includes travel (mileage), cost of job advertising, preparation of brochure and other materials, copying and postage/shipping costs, background check vendor fees, etc.). Job advertising is the major expense item.
There could be minimal increases in our proposed professional fee, depending on whether the **Board requests additional services or steps in the process** (requested management style assessments or other assessment instruments, design and implementation of a citizen review panel, etc.).
We will bill the professional fee in one-third increments, with the final invoice at the time of initial interviews, and bill actual incurred expenses at the end of each month.

COVID-19 Pandemic Adaptations: Every member of the firm has worked with our clients to adapt our practices and procedures to the pandemic emergency, which we hope is near the end. As an example, I participated in the semifinalists selection meeting with the Southern Shores, Town Council by Zoom in April last year, while Dare County was excluding non-residents. The Council conducted initial interviews by Zoom, and obtained an admission letter for me, as an essential service provider, from the Dare County Sheriff's Office. Then the Council conducted a face to face second interview with the finalist, with me participating by Zoom.
Recently I assisted with the Vermont League of Cities and Towns Executive Director search, and made no trips to Vermont. On the other hand, the Indian Trail Town Council, High Point City Council and Edenton Town Council preferred to conduct the semifinalists selection meeting and interviews face to face, and we accommodated those requests.

We are able and willing to help our clients adapt the search process as necessary and appropriate. So far we and our clients have not missed a beat.

I. FIRM BACKGROUND, QUALIFICATIONS AND CAPACITY

The Mercer Group provides executive search and management consulting services to local governments, state and national associations of local governments, and other public sector clients nationwide. The firm has operated under The Mercer Group, Inc. name for more than 30 years. James L. Mercer, the firm's founder and President/CEO, was the principal of predecessor firms for a previous nine years. He started his career as an Assistant City Manager in Raleigh, NC.

The Mercer Group corporate headquarters is located in Atlanta, GA (S corporation), and we have offices in many states: Arizona, California, Florida, Georgia, Maryland, Michigan, Minnesota, New Mexico (home of the President/CEO), North Carolina, Texas, Virginia and Washington. Our firm includes 16 professional consultants with extensive experience over many years. Many of our senior consultants are former or retired city managers, two are retired state municipal league directors, and others came from law enforcement, human resources, public works or other specialized local government fields. Firm membership has been relatively stable and consistent. **As noted in our cover letter, the most active members of the firm are now operating under the auspices of a related corporate entity while the Mercer family focuses on estate administration and other matters.**

Our firm's extensive work for state municipal leagues has broadened our understanding of municipal issues and public management, and enhanced our qualifications and national reach. We have assisted with more state municipal league executive director searches (15) than any other firm, by far, with successful results (those conducted by **Ellis Hankins** in **bold**): **California** (2016), **Connecticut (2014**), Georgia (2017), Kansas (2014), Kentucky (2010), **Maine (2015),** Michigan (2008), **Minnesota** (2015), New Hampshire **(2014**), North Carolina (2013), **Oregon** (2017), **Rhode Island (2016),** Texas (2010), **Utah** (2017) and **Vermont (2020-2021)**. We also assisted two state county associations with executive director searches, including California in 2018 (Ellis Hankins and our California partner), and several large public risk pools. Our recent searches include a senior executive search for Los Angeles County (2018). We also have conducted organization and management or pay and classification studies, or provided other consulting services, to several other state municipal leagues and county associations, and national associations.

Our firm assisted the City of Charlotte with two executive search services in recent years under a continuing contract, with Ellis Hankins designated as our Lead Consultant and Project Manager. We assisted the City Council with their City Attorney search, and assisted the City Manager with the City/County Risk Manager search, and attracted very strong candidate fields.

We will be pleased to provide an extensive client list upon request, including searches in North Carolina and across the nation, by our consultants as members of The Mercer Group, Inc.

We have a thorough understanding of municipal government, local government issues, and the job responsibilities of town managers. We will work on the Beaufort Town Manager search process, if awarded, primarily from our offices in Raleigh.

A. Recent City/Town Manager Searches

The Mercer Group, Inc., and now Mercer Group Associates, assists with an average of about 65 public sector searches across the nation each year, which equates to about 325 in the past five years. Typically about two-thirds of those are city or county manager searches, and most of the others are closely related to local government (state municipal leagues, public risk pools, airport authorities, etc.). In addition, we provide a range of other public sector consulting services, such as organization and management studies and pay and classification studies.

Representative list of **city/town manager searches** (in addition to a host of county manager and other public entity searches) with which members of our firm have assisted in recent years (partial list, not all-inclusive, North Carolina searches in **bold**):

Augusta, GA
Avondale Estates, GA
Beacon, NY (2015)
Berwyn Heights, MD
Billings, MT
Bowie, MD
Bristol, TN
Brunswick, GA
Cartersville, GA
Chesapeake, VA
Chesapeake Beach, MD
Cheverly, MD
Clarkston, GA
Clayton, NC
Cleveland, TN
Clinton, NC (successful limited scope engagement, after unsuccessful search by another firm)
Cocoa, FL
College Park, GA
College Park, MD
Coventry, RI (2015)
Covington, GA
Creedmoor, NC
DeBary, FL
Delray Beach, FL
Delta, CO
Deltona, FL
Des Moines, IA
Dunedin, FL
East Point, GA
Edenton, NC
Emerald Isle, NC
Fairburn, GA
Forest Lake, MN
Forsyth County, GA
Franklin, NH (2018)
Goldsboro, NC
Great Falls, MT
Hallandale Beach, FL
Hartford, VT (2015)
Hastings, MN
High Point, NC
Indian Trail, NC
Indian River Shores, FL
Joplin, MO
Key Biscayne, FL
Kiawah Island, SC
Largo, FL
Las Cruces, NM
Lebanon, NH (2015)
Manteo, NC
Marco Island, FL
Milliken, CO
New Carrollton, MD
New Shoreham, RI (2016)
Oneonta, NY
Oxford, NC
Palatka, FL
Palmetto Bay, FL
Petoskey, MI
Pinehurst, NC (limited scope assistance)
Pittsburg, KS
Plant City, FL
Pocomoke City, MD
Polson, MT

Poolesville, MD
Port Orange, FL
Portsmouth, VA
Poughkeepsie, NY (2016)
Red Springs, NC (limited scope)
Richland County, SC
Rocky Hill, CT (2014)
Roosevelt City, UT
Rosenberg, TX
Roswell, GA
Scottsdale, AZ
Seabrook Island, SC
South Kingstown, RI (2018)
St. Cloud, FL
Southern Shores, NC
Sun Valley, ID
Takoma Park, MD
Taneytown, MD
Taos, NM
Temple Terrace, FL
Troy, MI
Wentzville, MO
West St. Paul, MN
Westminster, MD
White House, TN
Yankton, SD

B. Key Personnel

Proposed Lead Consultant/Project Manager for the Beaufort Town Manager search:

S. Ellis Hankins, Senior Associate
1201 Little Lake Hill Drive
Raleigh, NC 27607
Cell & Text: 919-349-8988
ellis.hankins@gmail.com

Mr. Hankins is authorized to commit the firm to binding contractual obligations, and will be the primary contact person.

Recent searches and consulting engagements by Ellis Hankins (most as lead consultant and project manager, all full search engagements resulted in successful placements):

County Manager, Cumberland County, NC (2014)
Village Manager, Village of Pinehurst, NC (limited scope engagement, 2014)
General Manager, Greensboro (NC) Alcoholic Beverage Control Board (2014)
Director of Engineering and Environmental Services, Durham County, NC (2015)
Executive Director, Connecticut Conference of Municipalities (2015)
Executive Director, League of Minnesota Cities (2015)
Executive Director, Maine Municipal Association (2015)
City Manager, Creedmoor, NC (2015)
Executive Director, League of California Cities (2016)
Executive Director, Rhode Island League of Cities and Towns (2016)
Executive Director, Utah League of Cities and Towns (2017)
Executive Director, League of Oregon Cities (with Jim Miller, Minnesota office, 2017)
City Manager, Clinton, NC (limited scope engagement, 2017)
Town Manager, Town of South Kingstown, RI (2018)
Town Manager, Red Springs, NC (limited scope engagement, 2017)

Executive Director, California State Association of Counties (2018)
Deputy Executive Director/ED Designate, CityCounty Insurance Services (CIS), OR (2018)
Colorado Intergovernmental Risk Sharing Agency (CIRSA): Executive Director and Chief Financial Officer (2018)
Executive Director, Arkansas Municipal League
(limited scope engagement—salary analysis for Executive Director position, 2018)
Assistant Chief Executive Officer for Legislative Affairs and Intergovernmental Relations, Los Angeles County, CA (with Clark Wurzburger, Senior VP, Sacramento, as project manager, 2018-2019)
City of Charlotte: City Attorney and Risk Manager (2018)
Town Manager, Manteo, NC (2018-2019)
Town Manager, Emerald Isle, NC (2018-2019)
Director of Public Works and Utilities, Town of Ayden, NC (2019)
Commander, Special Investigations Unity, Sheriff's Office, Granville County, NC
(limited scope engagement, 2019)
Deputy Executive Director for Advocacy & Public Affairs, League of California Cities (2019)
Town Manager, Southern Shores, NC (2020)
Town Manager, Indian Trail, NC (2020)
Executive Director, Vermont League of Cities & Towns (2020-2021)
City Manager, High Point, NC (2020-2021)
Town Manager, Edenton, NC (Current, near completion)
Town Manager, Brattleboro, VT (Current)

Resume of our Proposed Lead Consultant and Project Manager:

S. Ellis Hankins, Senior Associate, Raleigh Office



Ellis Hankins served as a Senior Vice President with The Mercer Group, Inc. from early 2014 until 2021, and currently serves as a member of Mercer Group Associates.

He also is a senior attorney with The Brough Law Firm, PLLC, which specializes in representing local governments and litigation, with offices in Chapel Hill, Raleigh and Concord. He serves as the Person County Attorney and the Godwin Town Attorney. He served previously as Special Counsel for Cumberland and Scotland County, and Town Attorney for the Town of Spring Lake. He has a part-time Of Counsel relationship with the law firm.

Ellis also is a Visiting Professor in the Master of Public Policy program, Sanford School of Public Policy, Duke University; the Master of Public Administration program at the UNC-Chapel Hill School of Government; and the Master of Public Administration program at N.C. State University. He teaches public law and ethics, state and local government, public finance and taxation, and intergovernmental relations.

He served from 1997 until his retirement in early 2014 as Executive Director of the North Carolina League of Municipalities, the statewide municipal association. The League represents and assists 540 municipalities and related entities on state legislative and regulatory issues, on federal issues in partnership with the National League of Cities, and on a broad range of intergovernmental issues, often working with other local government associations, private sector trade associations, and state and federal agencies.

The League provides legal, policy research, communications and consulting services, and management advice on operations, public finance and personnel issues, to municipalities and associate members and professional affiliate organizations. It has a staff of 80, an operating budget of $13.5 million, and professional services contracts with several firms. The League also operates three local government insurance and risk management programs with assets of $250 million—property and liability, health benefits and workers compensation.

Ellis has moved between private law practice and the League staff during his career. He served previously as the League's General Counsel and chief state legislative lobbyist, and was ranked consistently among the most influential lobbyists in biennial surveys by the N.C. Center for Public Policy Research. He has represented municipalities and other public and private sector entities and associations in state and federal trial and appellate courts and before congressional committees. He is a former member of the National League of Cities Board of Directors; the NLC Mutual Insurance Company Board of Directors and executive committee (reinsurance company with assets of $300 million); the NCLM Risk Management Services Board of Trustees (oversees the three public risk pools sponsored and administered by the League); the UNC School of Government Foundation Board of Directors; the Wake County Parks and Recreation Commission; and has served on numerous other non-profit, public and private sector boards, commissions and committees.

Ellis currently serves as a member of the Raleigh-Durham Airport Authority Board, as an appointee of the Wake County Board of Commissioners. He assisted with the transition of NC Governor-Elect Roy Cooper in late 2016-early 2017, leading the assessment team that evaluated the Governor's Office, Department of Administration and Office of State Human Resources.

He formerly served as a volunteer guardian ad litem, advocating in court for children in need; and as a member of the NC League of Conservation Voters Board of Directors. He served as an early voting and Election Day poll worker in 2020, when the Wake County Board of Elections experienced election staffing difficulties.

Ellis is a member of the Order of the Long Leaf Pine, bestowed by Governor McCrory for exemplary service to the State of North Carolina. He is a lifetime honorary member of the NC League of Municipalities, the NC City-County Management Association and the NC Municipal Attorneys Association, and received the Grainger Barrett Award for Excellence from the NC Bar Association Government and Public Sector Section.

He is a native of North Carolina, attended UNC-Wilmington, and earned Bachelor of Arts, Master of Regional Planning and Law degrees from UNC-Chapel Hill. He is licensed to practice law in North Carolina and in federal courts. He completed the Fundamentals of Municipal Bond Law Seminar offered by the National Association of Bond Lawyers, and the Municipal Administration course at the UNC School of Government.

Ellis is married to Leanne Winner, who serves as Executive Director of the North Carolina School Boards Association. Their family lives in Raleigh.

C. Current Workload, Firm Capacity and Roles

We can begin work immediately on this important search project and work expeditiously under the timeline approved by the Board, and have plenty of time, capacity and professional expertise to do so. Mr. Hankins recently completed one search project (High Point City Manager), another is near completion (Edenton Town Manager), and one other search project is at the mid-point (Brattleboro, VT Town Manager). He has no fall semester teaching obligations. There are no time-consuming legal matters (law practice is part-time). Other members of our firm are available to assist with this search project as needed. We would not take on a project if we lacked capacity to fulfill our contractual obligations in a highly professional, timely and ethical manner.

Roles:
Ellis Hankins will perform the majority of the work with and on behalf of the Board, and will have overall responsibility within the firm for timely and successful completion of the process. He will be the principal contact and liaison, and will participate in Board meetings.

Other senior members of the firm will assist with active recruiting (informing well qualified potential candidates of the availability of the position and encouraging them to consider applying, and achieving diversity), resume review, and interviews with the strongest candidates to evaluate their respective strengths and weaknesses. Ellis Hankins or other senior members of the firm will speak with all references personally.

Another member of our firm will oversee background checks of semifinalists, working with reputable contract vendors with whom we have long-established relationships and high levels of confidence. Ellis Hankins will assist in negotiating terms of employment with the selected candidate, in accordance with the Board's directions. Ellis Hankins will be available to assist with the transition as provided in our agreement.

D. References

We are pleased to offer this extensive list of references. We encourage you to contact our references and hear their assessment of our work with them, and the culture, work ethic and professionalism of our firm generally.

1. Town of Edenton:
   The Honorable Jimmy Stallings
   Mayor
   Cell & text: 252-337-4800
   Email: JStallings44@yahoo.com

2. Town of Emerald Isle:
   The Honorable Eddie Barber
   Mayor
   Cell & text: 252-241-7719
   ebarber@emeraldisle-nc.org
   (Ellis Hankins—Town Manager search, 2018-2019)

3. City of High Point:
   The Honorable Jay Wagner
   Mayor
   jay.wagner@highpointnc.gov
   Cell & text: 336-906-2241
   (Ellis Hankins—City Manager search, 2020-2021)

4. Town of Southern Shores (Dare County):
   The Honorable Tom Bennett
   Mayor
   tbennett@southernshores-nc.gov
   Cell: 252-619-5996
   (Ellis Hankins--Town Manager search, 2020)

5. Town of Manteo:
   The Honorable Bobby Owens
   Mayor
   owens@townofmanteo.com
   Cell: 252-256-0668

   Mr. James Ayers, Town Manager (appointed early 2019)
   ayers@townofmanteo.com
   Office: 252-473-2133
   (Ellis Hankins—Town Manager search, 2018-2019)

6. The Honorable Darryl Moss
   Former Mayor, City of Creedmoor (Granville County)
   dmoss207@aol.com
   Cell: (919) 349-5443
   (Ellis Hankins—City Manager search, 2015)

E. Sample Work Products:

Please see the following sample work products, sent as attachments to the electronic copy.

- Emerald Isle Town Manager Recruitment Brochure (2018)
- Sample Summary of Strongest City Manager Candidates (for the meeting to select semifinalists for initial interviews)
- Supplemental Questions to City Manager Semifinalists
- City Manager Interview Evaluation Forms

F. Insurance

The Mercer Group, Inc. and Reddish Executive Search Associates, LLC (dba Mercer Group Associates) both carry professional liability insurance with limits of Two Million Dollars ($2 Million), and other appropriate coverages.

G. Equal Employment Opportunity, Compliance With Law

The Mercer Group Associates policy is to assure equal opportunity based on ability and fitness for all employees or applicants considered for our client organizations regardless of race, color, religion, sex, age, marital or veteran's status, national origin, sexual orientation or disability. Such policy shall apply, but not be limited to, hiring, placement, job classification, transfer or promotion, demotion, recruitment, advertising or solicitation for employment, rates of pay or other forms of compensation, selection for training, career development, layoff or termination. We will inform all potential applicants that the Town of Beaufort values diversity across the work force, in order to serve all citizens well.

We will comply with all applicable federal, state and local laws, ordinances, rules and regulations.

This policy will be disseminated to clients, subcontractors, suppliers and potential applicants. This policy also will apply to internal operations, recruitment and consulting activities conducted by our firm.

We work hard on active recruiting, and make our best efforts to achieve a strong candidate pool that is diverse in every way.

H. No Conflicts of Interest

We have no conflicts of interest, including relationships with any current or former Town personnel, and know of nothing that could reasonably be viewed or perceived as a conflict of interest. In the rare instance in which a conflict or potential conflict arises, all of us associated with the firm first consult the attached Code of Ethics, which addresses several areas of potential conflicts of interest, and consult with other members of our firm. We have years of professional and productive consulting experience, with high ethical standards.

II. PROPOSED SEARCH TIMELINE

Our search process normally takes just over 100 days from award of the contract to the final decision to appoint the new manager. That gives us abundant time to advertise availability of the position, recruit actively, and conduct thorough evaluation and background checks on finalist candidates. Several factors could extend the search time and work start date—difficulty scheduling meetings at key decision points, need to re-advertise and reopen the application process if an inadequate number of well qualified candidates apply initially, inability to negotiate a mutually acceptable employment agreement with the selected candidate, selected candidate's need to provide a longer than normal notice period to his or her current employer, etc.

TOWN OF BEAUFORT
TOWN MANAGER SEARCH
PROPOSED/DRAFT TIMELINE
(Highlighted bolded events indicate Board meetings)

Proposal Accepted, Contract Executed	Aug. 9, 2021
Consultant Send Revised Proposed/Draft Timeline & Job Ad for Board Consideration	Aug. 10
Consultant Meet with Department Heads as a Group, to Discuss Desired Background, Qualifications, Experience & Characteristics	~Aug. 16 (late afternoon)
Board Meeting & Public Hearing to Discuss the Town Manager Job Responsibilities, Search Process & Desired Background, Qualifications, Experience & Characteristics; & Discuss & Approve Search Timeline & Job Ad	~Aug. 16 (early evening?)
Draft Recruitment Brochure/Position Profile to Board for Review and Approval	Aug. 20
Board or Designees Approve Draft Recruitment Brochure Text (with requested revisions by individual email messages)	Aug. 30
Consultant Place Job Ads (stating that "first review of applications begins on Oct. 12"), Formally Begin Search Process	Aug. 31
Formatted Color Recruitment Brochure to Board for Final Review and Approval	Sept. 6
Begin Disseminating Brochure and Consideration/Invitation Letters and E-mail Messages	~Sept. 8

Consultant Begin Phone Calls To and About Potential Candidates, Aggressively Recruit Qualified Candidates	Sept. 13
Report to Board on Search Progress	Bi-Weekly
Phone Conversations w/ Strong Candidates, Preliminary Reference & Background Checks	Oct. 1-14
Soft Application Deadline ("first review of applications begins on Oct. 12")	Oct. 12
Consultant Deliver 8-12 (or more) Applications & Summaries to Board By E-mail &/or FedEx	Oct. 18
Board Meeting to Consider Recommended Candidates, Select 5-7 Semifinalists to Interview (closed session meeting, 1 ½ - 2 hours)	~Oct. 21
Consultant Invites/Schedules Semifinalists for Board Interviews, Sends Supplemental Questions, Begins Preliminary Reference & Background Checks	Oct. 21-22
Interview Guide Materials to Board	~Nov. 5
Consultants Complete Reference and Background Checks on Selected Semifinalists	Nov. 7
Board Interviews ~5-7 Semifinalists—Determines Preferred Candidate or Selects 1-2 Finalists for Second Interview (**Proposed face to face interviews**, with candidates & consultant physically present)	~Nov. 8
Consultants Talk with Additional References, Other Due Diligence	After initial interviews
Board Second Interview(s) if Desired	~Nov. 19
Board Decision, Negotiate with Selected Candidate	After initial or 2d interview
Board Votes to Appoint Town Manager in Open Meeting (and probably approve employment agreement)	~Late Nov.
Announce Appointment of New Town Manager	~Late Nov.

New Town Manager Reports to Work, Transition
Work With Retiring Town Manager (several days) ~Late Dec. (earlier if internal candidate)

Note: The retiring Town Manager has given the Board plenty of advance notice. This is a sound and realistic timeline designed to bring the availability of the position to the attention of a significant number and diversified range of well qualified potential candidates. This gives the consultants adequate time to check references and complete thorough background checks. We always counsel clients to allow adequate time for a successful process, with the opportunity to review strong candidate applications and deliberate carefully. Once the Board approves this detailed timetable, with desired changes, the consultant and Board will need to follow it faithfully.

The job ad will run in and on carefully targeted publications and websites for **six weeks**, an adequate length of time to help bring the availability of the position to the attention of many well qualified potential applicants (particularly important because of varying publication dates). The consultants will supplement the job advertising with targeted calls and email messages to well qualified municipal managers and other well qualified potential candidates to encourage them to consider applying for the position.

The timeline also allows the consultants to deliver applications and summaries about well qualified candidates in advance of the proposed semifinalist selection meeting, so the Board members will have a few days to review the information before the Board discussion with us about which candidates to invite for interviews. The consultants will be readily accessible and provide full support to the Board in your interview process, toward the goal of appointing a new Town Manager who is a good match with the desired background, qualifications, experience and characteristics identified by the Board and interested citizens at the beginning of the process, and a good fit for Beaufort. We also will assist with an orderly transition as an important part of our scope of services.

III. COST PROPOSAL

Our proposed professional services fee, plus reimbursement of actual expenses, are as stated above in the Executive Summary: $18,500 professional services fee, plus reimbursable expenses not to exceed $4,000.

There could be minimal increases in our proposed professional fee, if the Board requests additional services or steps in the process (requested management style assessments or other assessment instruments, design and implementation of a citizen review panel, etc.).

Reimbursable actual expenses, not to exceed the stated $4,000 expense cap, are for consultant travel (mileage, and lodging if necessary), meal per diem, job advertising (the major expense item), recruitment brochure preparation and dissemination, background investigation (vendor fees), copying and postage/shipping costs. Most of that is the cost of advertising the position.

Because of our extensive consulting and search experience, we will make all reasonable efforts to minimize expenses. We will provide the benefit of bulk purchases of job ad placements, etc. **The cost for candidates to travel to interview with the Board, if applicable, is not included.** Such costs typically are paid by the client on a reimbursement basis, directly to the candidates but coordinated by us. These costs are difficult to estimate because they depend on where the candidates are located. Typically, out-of-state travel costs run about $750 to $1,000 per person (mostly air fares), and travel costs for candidates located within driving distance are much less.

The Town's liability to Reddish Executive Search Associates, LLC, for services rendered under this agreement will not exceed the agreed upon professional fees plus expenses (capped), unless an increase is authorized by the Town in writing.

We will submit regular invoices for fees and expenses on the schedule noted in the Executive Summary above.

IV. OUR CODE OF ETHICS

Clients

1. We will serve our clients with integrity, competence, and objectivity.

2. We will keep client information and records of client engagements confidential, and will use proprietary client information only with the client's permission.

3. We will not take advantage of confidential client information.

4. We will not allow conflicts of interest that provide a competitive advantage to one client through our use of confidential information from another client who might be a direct competitor in considering and potentially hiring a common candidate, without the informed consent of the other client.

Engagements

5. We will accept only engagements for which we are qualified by our experience and competence.

6. We will assign staff to client engagements in accordance with their experience, knowledge and expertise.

7. We will acknowledge immediately any influences on our objectivity to our clients and will offer to withdraw from a consulting engagement if our objectivity or integrity may be impaired, or if there is any appearance of potential impairment.

Fees

8. We will agree independently and in advance on the basis for our fees and expenses, and will charge fees and expenses that are reasonable, legitimate and commensurate with the services we deliver and the responsibility we accept.

9. We will disclose to our clients in advance any fees or commissions that we will receive for equipment, supplies or services we recommend to our clients (this has never happened).

Profession

10. We will respect the intellectual property rights of our clients, other consulting firms and sole practitioners, and will not use proprietary information or methodologies without permission.

11. We will not advertise our services in a deceptive manner and will not misrepresent the consulting profession, consulting firms or sole practitioners.

12. If we observe or become aware of unethical or unlawful conduct by others, we will report it to appropriate entities or authorities.

V. MERCER GROUP ASSOCIATES GUARANTEES

We offer the following valuable guarantees with respect to our search work:

1. Client Organization: The client is the entire entity, including all departments, divisions, sections and groups. All of our guarantees apply to the entire client organization.

2. Two-Year Off Limits: We will not recruit candidates from a client organization for two years after completion of a search assignment without the informed consent of the client. Upon request, we will disclose to a client the client organizations that are "Off Limits" and cannot be viewed by us as target organizations because of our previous contractual commitments.

3. Placement Off Limits Forever: We will never recruit a candidate whom we have placed in a client organization as long as he/she is employed by that organization, without the informed consent of the client. Obviously such individuals are free to apply for other positions without recruitment or encouragement from us.

4. Continue the Search: If, for any reason, the client does not feel comfortable selecting a candidate from our original recommended group of candidates, we will continue the search until the client can make a selection. The only caveat is that we will request reimbursement of actual additional expenses only for this additional work (new job ads and travel expenses, etc.).

5. Replacement of Successful Candidate: If the candidate we place with the client leaves the client organization for any reason (other than serious illness or death) during the 24-month period following the candidate acceptance of the offer of employment, we will assist with a new search with no additional professional services, but we will request reimbursement of actual additional expenses only for this additional work.

6. Parallel Candidate Presentation: We will not present a candidate simultaneously to more than one client, without the informed consent of all affected clients. This permits our firm to represent client organizations without any conflicts of interest.

7. Deceptive/Misleading Search Techniques: We commit to our clients and to our prospective candidates that we will not use any search techniques that might be viewed as deceptive or misleading.

8. Resume Floating: We will not float resumes to organizations with the hope that we can collect a fee if that individual is hired.

9. Represent Employers, Not Individuals: We work for and represent the client employer under contract. Accordingly, our professional obligations are to the client, not individual candidates, although we will treat each candidate or potential candidate respectfully. We will not seek or accept a fee from candidates whom we recommend for consideration.

VI. PROPOSED AGREEMENT

DRAFT
AGREEMENT FOR PROFESSIONAL SERVICES

This AGREEMENT is entered into this ___ day of August, 2021, by and between REDDISH EXECUTIVE SEARCH ASSOCIATES, LLC, a Georgia corporation, doing business as Mercer Group Associates, and the TOWN OF BEAUFORT, NC, a municipal corporation or governmental unit established under applicable state laws.

WITNESSETH:

WHEREAS, the Town of Beaufort (the "Town") requested a proposal and desires to retain a qualified firm to conduct an executive search for a new Town Manager; and

WHEREAS, Reddish Executive Search Associates, LLC, doing business as Mercer Group Associates ("Mercer") submitted a proposal; and

WHEREAS, the Town determined that Mercer's proposal meets its needs and the Town desires to retain Mercer to assist in conducting the search for a new Town Manager; and

WHEREAS, Mercer desires to assist the Town in conducting the Town's search for a Town Manager;

NOW THEREFORE, in consideration of the following mutual covenants and other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged by the parties, Mercer and the Town agree as follows:

1. Mercer agrees to provide professional services and support to the Town in the conduct of the Town's search for a Town Manager. Mercer agrees to conduct the project in accordance with the scope of services and other provisions in its Proposal to the Town dated July 31, 2021, and in accordance with the professional standard of care exercised by similar consulting firms in the industry.

Mercer's proposal is incorporated by reference and made a part of this Agreement.

2. The Town agrees to compensate Mercer for its services in the amount of EIGHTEEN THOUSAND FIVE HUNDRED DOLLARS ($18,500) for professional services, plus actual expenses capped at a maximum amount of $4,000, as stated in the proposal, to conduct the search. Payments are to be made as outlined in the COST PROPOSAL Reasonable Fees section of Mercer's proposal and as set out below.

3. This Agreement shall be governed by the laws of the State of North Carolina.

4. In the event that any dispute arises between the parties, the complaining party shall promptly notify the other of the dispute in writing. The other party shall respond to the complaining party in writing within ten (10) working days of receipt of such notice, and make reasonable efforts to resolve the dispute and cure any alleged breach of the Agreement. The parties shall consider use of a mediator to assist in resolving the dispute.

5. This Agreement contains the entire agreement between the parties. Any amendments to this Agreement shall be made in writing and executed by both parties. No proposed amendment which is not in writing and executed by both parties shall affect the terms of this Agreement.

6. Both parties shall have the right, at the convenience of either party, to terminate this Agreement, after first attempting to resolve the dispute as provided in Paragraph 4, and after ten (10) days additional written notice to the other party. Should either party terminate this Agreement, Mercer shall provide to the Town within a reasonable time all material written information and documents related to the search, including a list of candidates who have applied for the position up to the date of termination and all application materials. Upon termination, the Town shall be obligated to pay Mercer only for those services already provided, plus actual expenses incurred; provided that if the Town extends an offer of employment to one of the candidates presented to the Town by Mercer, the full amount of professional fees provided for in the Agreement shall be due and payable within thirty (30) days after the offer of employment.

TOWN OF BEAUFORT, NORTH CAROLINA

BY: _____

Name, Office:

_____

(Print or type)

(SEAL)

ATTEST:

_____

Town Clerk

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

_____

Finance Officer

Agreement, Continued (Page 3 of 3)

REDDISH EXECUTIVE SEARCH ASSOCIATES, LLC, doing business as
Mercer Group Associates

BY: _____

S. Ellis Hankins
Senior Associate
(with full authority to bind Reddish Executive Search Associates, LLC to contract obligations)

APPENDICES

APPENDIX A: PREVIOUS SEARCHES
(The Mercer Group, Inc. and Mercer Group Associates)

Representative Clients

North Carolina
City of Asheville (city attorney search, 2014)
City of Burlington (current police chief search)
Town of Carrboro (town manager search)
Carteret County
Centralina Council of Governments (executive director search)
Town of Chapel Hill
Charlotte Housing Authority
City of Charlotte
(3 city manager searches, City Attorney & Risk Manager searches 2018; previous continuing contract with City for executive search services with Ellis Hankins as lead consultant and project manager)
City of Clinton (city manager search, 2017; current police chief search)
City of Concord (city manager search, 1999)
City of Creedmoor (city manager search, 2015)
Cumberland County (county manager search, 2014)
City of Durham (most recent city manager search, 2008)
Durham County (department director search, 2015)
Town of Edenton (current town manager search)
Town of Emerald Isle (town manager search, 2018-19)
City of Fayetteville (city manager search, 2006)
Forsyth County
Gaston County (county manager search, 2013 & 2019)
City of Goldsboro (most recent city manager search, 2019, & previous manager searches)
City of Greensboro (assistant city manager search)
Greensboro ABC Board (general manager search, 2014)
Greenville (city manager search)
Guilford County
City of High Point (city manager search, 2020-2021)
Town of Indian Trail (town manager search, 2020)
Institute of Government (School of Government), University of North Carolina-Chapel Hill
City of Jacksonville (three city manager searches)
Kannapolis Chamber of Commerce
City of Laurinburg (city manager search)
Town of Manteo (town manager search, 2018)
Town of Matthews (town manager search)
Mecklenburg County (tax assessor search, 2013
City of Monroe (city attorney search, 2015)

Town of Mooresville (town manager search)
Town of Mt. Holly (town manager search)
NC League of Municipalities
(executive director search 2013; previous pay & class study, organization & management study)
NC State University
Onslow County
Orange County (two county manager searches, county attorney search)
City of Oxford (city manager search, 2016)
Village of Pinehurst (limited scope assistance with village manager search, 2014)
City of Raleigh (several city manager searches, most recent 2000)
Town of Red Springs (2017)
Town of Southern Shores (town manager search, 2020)
Union County (two county manager searches)
City of Wilmington (most recent city manager search, 2003, deputy manager search)
City of Wilson
City of Winston-Salem
Wake County

Outside North Carolina
City of Alexandria, Virginia
American Public Works Association
American Society for Public Administration
City of Ann Arbor, Michigan
University of Arizona
Arlington County, Virginia
City of Aspen, Colorado
City of Atlanta, Georgia
City of Aurora, Colorado
City of Austin, Texas
City of Bellevue, Washington
City of Billings, Montana
City of Bowling Green, Kentucky
Town of Brattleboro, VT (current town manager search)
City of Brunswick, Georgia
League of California Cities (2016 executive director search, plus 2019 deputy search)
California State Association of Counties (executive director search, 2018)
City of Cedar Rapids, Iowa
City of Charlottesville, Virginia
City of Charleston, South Carolina
City of Chesapeake, Virginia
The Coca-Cola Company
City of Cocoa, Florida
Colonial Williamsburg Foundation
Colorado Intergovernmental Risk Sharing Agency (CIRSA)
Colorado Municipal League
City of Columbus, Georgia

Connecticut Conference of Municipalities (2014-15 executive director search)
City of Cumberland, Maryland
City of Dallas, Texas
City of Dayton, Ohio
DeKalb County Schools, Georgia
City of Dover, Delaware
City of Eugene, Oregon
City of Fairburn, Georgia
City of Fayetteville, Arkansas
City of Fort Lauderdale, Florida
City of Fort Worth, Texas
Fairfax County, Virginia
Florida Association of Counties
Fulton County, Georgia
City of Gainesville, Florida
Georgia Association of Chiefs of Police
Georgia Institute of Technology
Georgia Municipal Association (2017 executive director search)
Georgia Power Company
Georgia State University
State of Georgia
Association of County Commissioners of Georgia
Glynn County, Georgia
City of Greenville, South Carolina
City of Hampton, Virginia
City of Hastings, Minnesota
City of Houston, Texas
Henrico County, Virginia
IBM Corporation
City of Independence, Missouri
Institute of Government, University of Georgia
International City Management Association
International Institute of Municipal Clerks
International Personnel Management Association
Town of Jackson, Wyoming
Kansas League of Municipalities (2014 executive director search)
Kentucky League of Cities (most recent executive director search, 2010)
City of Lincoln, Nebraska
City of Little Rock, Arkansas
County of Los Angeles, California (2018)
Port of Los Angeles (several searches, including 2019)
City of Louisville, Kentucky
Maine Municipal Association (2015 executive director search)
City of Marco Island, Florida
Maryland Municipal League
Maxwell School of Government, Syracuse University

Metropolitan Government of Nashville, Tennessee
Michigan Municipal League (executive director search)
University of Michigan
City of Milton, Georgia
State of New Mexico
City of Minneapolis, Minnesota
League of Minnesota Cities (2015 executive director search)
New Hampshire Municipal Association (2014 executive director search)
City of Newport News, Virginia
City of Norcross, Georgia
City of Norfolk, Virginia
City of Norman, Oklahoma
City of North Little Rock, Arkansas
City of North Miami Beach, Florida
National Aeronautics and Space Administration
National Highway Traffic Safety Administration
National Science Foundation
Government of The Netherlands
State of Ohio
City of Oklahoma City, Oklahoma
University of Oklahoma
Citycounty Insurance Services, Oregon (deputy director/exec director designate search 2018)
League of Oregon Cities (2017 executive director search)
City of Palatka, Florida
Palm Beach County, Florida
Town of Palm Beach, Florida
City of Pasadena, California
City of Pascagoula, Mississippi
Pennsylvania Association of County Commissioners
City of Pensacola, Florida
City of Petersburg, Virginia
Proctor & Gamble
City of Pueblo, Colorado
City of Roswell, Georgia
City of Shoreview, Minnesota
City of St. Petersburg, Florida
Rhode Island League of Cities and Towns (2016 executive director search)
City of San Antonio, Texas
City of San Diego, California
City of San Jose, California
Santa Cruz Metro, California
City of Sarasota, Florida
City of Savanah, Georgia
City of Scottsdale, Arizona
Town Seabrook Island, South Carolina
Town of South Kingstown, Rhode Island

State of South Carolina
City of Spartanburg, South Carolina
City of Spokane, Washington
University of South Carolina
City of Statesboro, Georgia
City of Taneytown, Maryland
Texas Municipal League (most recent executive director search, 2010)
City of Thornton, Colorado
City of Topeka, Kansas
City of Tucson, Arizona
City of Tulsa, Oklahoma
University of Texas at Austin
U.S. Agency for International Development
U.S. Department of Commerce
U.S. Department of Housing and Urban Development
U.S. Department of Justice
U.S. Department of Transportation
Utah League of Cities and Towns (2017 executive director search)
City of Valdosta, Georgia
Vermont League of Cities and Towns (executive director search, 2020)
City of Virginia Beach, Virginia
City of West Hollywood, California
City of West Palm Beach, Florida
State of Wyoming

July, 2021

APPENDIX B: SAMPLE WORK PRODUCTS
(See as attachments in a separate email message)

- Emerald Isle Town Manager Recruitment Brochure (2018)
- Sample Summary of Strongest City Manager Candidates
- Sample City Manager Supplemental Questions
- Sample City Manager Interview Evaluation Forms

In Memoriam:

Jim Mercer, 1936 – May 24, 2021

TOWN OF BEAUFORT
FY 2022 BUDGET AMENDMENT #2

WHEREAS, the Town of Beaufort adopted its Fiscal Year 2022 Budget through Ordinance on June 14, 2021, and

WHEREAS, the Board of Commissioners recognizes that periodic modifications to the estimated revenues and expenditures for the fiscal year may be necessary for fiscal management purposes and to implement decisions of the Board of Commissioners;

BE IT THEREFORE ORDAINED that the Board of Commissioners amends the Fiscal Year 2022 Budget as follows:

SECTION I: GENERAL FUND

This amendment requests the appropriation of fund balance for manager recruitment contract with Mercer Group.

A. REVENUE

INCREASE

APPROPRIATED FUND BALANCE	$ 22,500
TOTAL INCREASE	**$ 22,500**

B. EXPENDITURES AUTHORIZED BY DEPARTMENT

INCREASE

NON-DEPARTMENTAL	$ 22,500
TOTAL INCREASE	**$ 22,500**

SECTION VI: DISTRIBUTION

Copies of this ordinance shall be furnished to the Town Manager and Finance Officer to be kept on file for their direction in the disbursement of funds.
Adopted this 9th day of August, 2021
ATTEST:

Allen Coleman
Town Clerk

Everette S. Newton
Mayor

Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Items for Discussion and Consideration

SUBJECT: County Water Rate Increase – Eastman Creek Subdivision

BRIEF SUMMARY:

The Carteret County Board of Commissioners recently increased water rates. The Town purchases water from the County to serve the Eastman Creek subdivision. Town records show that there are 144 water accounts in Eastman Creek. The 2020 water charges for the subdivision totaled $60,038. Town staff calculations show that about $35,000 of additional cost would have been incurred had the new County rates been in effect during 2020. This change would have resulted in the Town providing water to the subdivision at a deficit.

The Town Board of Commissioners requested during their July work session that Town staff develop several alternative rates for potential adoption by the Board. Each set of rates was to be designed to account for the higher County rates *plus* the cost of operating the Eastman Creek distribution system. Below is a listing of the current rate set along with the alternative rates Town staff developed using 2020 water consumption data as the basis for calculations. Each rate is intended to result in breakeven operation of the distribution system.

Scenario	Flat Fee	Rate per 1,000 gallons	Billing for 2,500 gallons	Billing for 3,500 gallons	Billing for 4,500 gallons
Current	$20.74	$ 7.61	$39.77	$47.38	$54.99
Alternative 1	$33.80	$ 7.61	$52.83	$60.44	$68.05
Alternative 2	$20.74	$13.12	$53.54	$66.66	$79.78
Alternative 3	$27.30	$10.35	$53.18	$63.53	$73.88

The Alternative 1 retains the current variable rate and overcomes the deficit through a higher flat fee. Alternative 2 retains the current flat fee and overcomes the deficit through a higher variable rate. Alternative 3 raises both the flat fee and variable rate above the current amounts, providing an option between Alternatives 1 and 2. In choosing an option, the question is whether emphasis is placed on the actual amount of water used, on the fixed flat fee, or on balancing the two.

REQUESTED ACTION:

The Board is asked to consider adoption of new water rates for customers located within the Eastman Creek subdivision.

EXPECTED LENGTH OF PRESENTATION:

10 minutes

SUBMITTED BY:

Greg Meshaw, PE, Town Engineer

BUDGET AMENDMENT REQUIRED:

No

RESOLUTION APPROVING CONNECTION OF PROPOSED EASTMAN'S CREEK SUBDIVISION TO MUNICIPAL SEWER

WHEREAS, the Town of Beaufort has received a request from SSB Properties, LLC, (the "Developer") to allow connection of a proposed subdivision to the Town's sewer main (the "Highway 101 Sewer Main") that extends down Highway 101 to the Jarrett Bay Boat Works project; and

WHEREAS, the subdivision project (the "Project") consists of approximately 64 acres as shown on a plat captioned "Eastman's Creek Village" preliminary sketch plan prepared by Powell Surveying Company dated January 7, 2002, amended February 11, 2002 on file at Town Hall, such property being located northwest approximately 4.6 miles from the present town limits of Beaufort; and

WHEREAS, the Developer of the Project has expressed the intention of subdividing approximately 162 lots for single family residential use.

NOW THEREFORE, BE IT RESOLVED by the Board of Commissioners for the Town of Beaufort as follows:

1. Connection of the Project to the Highway 101 Sewer Main is approved according all of the conditions and provisions of this resolution.

2. To reserve the sewer capacity described herein, the Developer shall submit a request for commitment of sewer service and shall file with the Town evidence of ownership of the Project.

3. Following acquisition of the property comprising the Project, the Developer must sign a petition requesting voluntary satellite annexation of the entire Project into the city limits of

the Town of Beaufort. This petition will acknowledge that the town may not accept the Project into the city limits for years in the future; however, the petition will remain irrevocable for as long as the Project is served with Beaufort municipal sewer. The petition will be in a form recordable at the Carteret County Register of Deeds office. In addition to the petition, the Developer will include a provision in restrictive covenants to be imposed on the Project binding the future purchasers of lots to the terms of the petition for annexation. Such provision will specifically provide that all lot owners, upon the purchase of a lot in the Project are deemed to have waived any right to object to annexation of the Property by the Town of Beaufort.

4. The Developer will provide a letter to the Town requesting that the North Carolina General Assembly adopt a special bill that will allow the Town of Beaufort to annex the Project.

5. The Developer will obtain at his sole cost and expense, all necessary development permits from the Carteret County Planning Authority, and any other regulatory agencies having jurisdiction over the subdivision for development of the Project for not more than 170 single family residential lots.

6. Anticipating future annexation into the Town of Beaufort,

(a) the Developer will cause the Project to be platted consistent with the Town's subdivision ordinances; and

(b) the Developer must include in restrictive covenants imposed on the Project, land use restrictions in substantially the same form as currently contained in the Town's R-10 zoning district

for those parts of the Project to be developed with 10,000 square feet lots, and for those lots to be developed as 15,000 square feet lots, the land use restrictions in the Town's R-15 zoning district. Additionally, Developer will include in the restrictive covenants a provision requiring "stick built" single family residences on each lot. If there is a conflict between the provisions of the zoning ordinance and this resolution, the provisions of this resolution will control.

7. The Developer will install at his sole cost and expense within the Project, and extended to the point of connection with the Highway 101 Sewer Main, all sewer lines, sewer mains, lift stations, sewer meters, emergency power systems, utility lines, and all such other equipment, fixtures and devices that are necessary for the installation and use of a sewer system within the Project. (Such sewer lines, sewer mains, lift station, etc. are referred to in this resolution as the "Project System.") The Project System will be designed by professional engineers engaged by the Developer in accordance with all laws and regulations pertaining to municipal sewer systems and such design will be consistent with current standards for the sewer system within the primary limits of the Town.

8. The Developer will pay all costs associated with actual connection of the Project System to the Highway 101 Sewer Main. The Town may require a deposit of the expected costs associated with the connection prior to allowing the connection.

9. In the event the Town incurs any expenses relating to

allowing connection of the Project System to the Highway 101 Main, such as engineering fees, and direct costs relating to the actual connection to the Town's main, the Developer will reimburse the Town for such costs and Town reserves the right to acquire a prior deposit of the expected costs of the same.

10. Upon installation of the Project System and certification by the appropriate engineers that the system has been installed in accordance with laws and regulations pertaining to municipal sewer systems and good engineering practice, the Developer will offer to convey such Project System to the Town for One Dollar ($1.00) consideration. This offer shall remain irrevocable as long as the Project is receiving municipal sewer. Until accepted by the Town, the Developer will be fully responsible for all costs associated with maintaining and operating the Project System.

11. The connection to the Town sewer system will be subject to the provisions of the "Policy for the Provision of Sanitary Sewer Service Beyond the Corporate Limits of the Town of Beaufort", adopted _____, 1999, as amended (such policy as amended be referred to herein as the "Policy"), when not inconsistent with this resolution.

12. Prior to the connection of the Project System to the Highway 101 Sewer Main, the Developer will pay to the Town of Beaufort sewer impact fees for a minimum of 162 single family sewer connections according to the then current rates for impact fees applying in the primary city limits. If more lots are approved by the Carteret County Planning Authorities than 162, the number of

impact fees will be increased accordingly.

13. At the time of connection of each residence in the Project to the Project System, either the Developer or the owner of lot to be served will pay to the Town such connection or "tap in" fee as may be then generally charged within the primary limits of the Town of Beaufort.

14. In addition, at the time each residence in the Project is connected to the Project System, either the Developer or the owner of the lot in question will pay to the Town of Beaufort $500.00 to be remitted to Carteret County relating to recoupment of a Community Development Block Grant ("CDBG") used for construction of the Highway 101 Sewer Main pursuant to the contract between Carteret County and the Town of Beaufort dated April 20, 1998.

15. Prior to annexation into the city limits of the Town of Beaufort, the Town will charge the consumers in the Project the Town's prevailing rate for sewer service outside the city limits (which are currently double the in town rates). After annexation sewer user rates in the Project will be charged according to such rate schedules as are from time to time adopted by the Board of Commissioners consistent with State law pertaining to charges for municipal services within satellite annexed areas.

16. Unless more restrictive in the Beaufort subdivision ordinances, the Developer, on the subdivision plats will reserve sewer easements at least fifteen feet in width along all street rights of way and twenty feet in width along actual sewer lines that are not placed adjacent to street rights of way. Developer

will cause the sewer lines to be centered in the easements, except that sewer lines and mains parallel to streets may be located within the outer five feet of the street right of way line. No structure shall be built in the sewer easements except the Project System, other utility installations, and driveways and streets (where sewer lines cross under the paved street). The sewer easement will provide the right of access to the Project System for purposes of maintenance, repair, replacement, and improvement. The easement will be assigned to the Town.

17. Sewer lines, fixtures and equipment, will not be located under street pavement except as necessary to cross under a street.

18. All streets in the Project will be platted and constructed, including pavement, to state standards and offered for dedication to the public.

19. For a period of five years from the adoption of this resolution, the Town of Beaufort will reserve sufficient sewer capacity to serve either 162 single family residences or such lesser number of residences reflected on Developer's approved subdivision plan or master plan for the Project. For purposes of determining capacity, the Town will consider each residence to have three bedrooms. For each platted lot not connected to the Project System within five years from the date of this resolution, the owner of such lot, whether the Developer or otherwise, shall be obligated to pay the Town's minimum monthly sewer rate. If Developer has phased the development of the Project, and has not platted a total of at least 162 lots, the Town may repurchase the

unused capacity for such undeveloped areas pursuant to the Policy. The terms of this provision will be incorporated in the restrictive covenants for the Project.

20. The Developer, at Developer's sole cost and expense, will cause potable water lines and appropriate fire hydrants to be installed within the Project. The fire hydrants will be located as needed to qualify the Project for an ISO rating comparable to that in the primary city limits of the Town of Beaufort. Such water lines, meters, hydrants, and appurtenant equipment and fixtures will be conveyed to Carteret County or the owner of the water system providing water in the Project in consideration of $1.00.

21. The sewer capacity reserved through the Project shall not be assignable to any other land or project.

22. A condition of this resolution by incorporation of the Policy is potable water service to the Project owned or operated by the Town. Potable water will be provided by the North River water system currently owned by Carteret County and operated by the Town. The Town has no plans to purchase such system. If events beyond control of the Developer or owners of lots within the Project cause the condition with respect to potable water to fail, the Developer, or in default by the Developer, the owner of each lot within the Project shall be obligated, at the demand of the Town, to pay the Town for a sewer meter and all costs of installation of such meter to measure the flow of waste water from the owner's lot for purposes of billing. This provision will be included in the restrictive covenants for the Project.

23. If the Developer phases development of the Project, each phase will be subject to the conditions of this resolution.

24. All documents required of the Developer in this resolution shall be drafted to the satisfaction of the Beaufort Town attorney.

Enacted on motion of Commissioner _____ seconded by Commissioner _____ and approved on a vote of _____ in favor and _____ against.

This the _____ day of _____, 2002.

TOWN OF BEAUFORT

By: _____
Mayor

Attest:

_____
Town Clerk

Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY:	Items for Discussion and Consideration
SUBJECT:	Beaufort Garden Club Public Art Project at Topsail Park "Menhaden Melody"

BRIEF SUMMARY:

The Beaufort Garden Club received approval from the Board of Commissioners in May 2021 to donate public art at Topsail Park. The Board asked the club to bring the final design back for approval. The design is ready for consideration.

The Garden Club has a subcommittee dedicated to public art led by Cindy Cash that has been leading this project. The approved theme is in honor of the Menhaden Fishing Industry. A sculpture will be placed in the center of the new walkway at the recently renovated Topsail Park on Front Street in downtown Beaufort. The Club has secured funding via donations and fundraising to finance the project.

They are seeking approval of the design. The artist selected for the project is Kirk Parker Davis, of ArtForms Studio in Morehead City.

Please find photos attached of "Menhaden Melody." A 3-dimensional model is available at Town Hall for viewing.

The art sculpture as currently proposed is 10 feet tall and 6 feet wide and constructed of marine grade powder coated aluminum. The sculpture would be placed on top of a concrete base. The BGC would like a 4-foot base to help keep pedestrians from climbing on the structure.

The entire project as proposed would be 14 ft tall and 6 ft wide.

Town Staff has been working with the artist and the club to ensure all safety ratings, wind ratings etc are in place. The BGC will need to hire someone to install the base. Town staff is unable to assist with the installation and base due to the specific requirements that are involved. The installation process needs to ensure the newly renovated park is not damaged by equipment needed for the installation of the sculpture.

Staff recommends a 2-foot base thus lowering the total project to 12 ft. tall and 6 ft. wide.

Town Engineer Sam Bell has been assisting to ensure the engineering of the base structure meets all standards. He will be available during the meeting to answer engineering questions

about the project. Public Utilities will need to do a locate to ensure there is not infrastructure that would be impacted depending on the dynamics of the base.

While this project is not required to receive approval from the Historic Preservation Commission, staff has been working with the Planning Department to ensure the scale of the project fits with the current standards of the district.

The Club will return to the Board of Commissioners in the future for approval of the proposed storyboard to be installed in Topsail Park on the topic of the Menhaden Fishing industry. This project will begin after the art project has moved forward as a phase 2.

ATTACHMENTS:

- Photos of “Menhaden Melody”
- Original Presentation Found at: https://mccmeetings.blob.core.usgovcloudapi.net/beaufortnc-pubu/MEET-Packet-a191e596377248eab97fd46776963780.pdf (beginning on page 509)
- Letter from the Beaufort Garden Club

Information on base size from the Artist:

Safety is indeed of concern and the reason that I designed the base to its recommended height. The photo that I provided of the scaled model shows two kids standing beside the base with arms up. One child is approximately 4' in height and the other at 3'.

I used the golden ratio of proportions in determining the base's proper height based on 3 equal proportions, 2 parts sculpture to 1 part base, to give or take 6". 14' divided by 3 = 4.666666 I do not understand the reasoning for making the base any lower. Could it be a weight issue? Cost? The walls should be built from cement blocks and the center filled with sand. similar to that of slab foundation for a house. It doesn't have to be solid if that's the concern. I do not think that it will appear to look too big for the given area and a 4' x 4' sheet of plywood set in place would prove my point. Large sized sculptures on paper may seem big unil placed outside next to tall buildings. Look at the tallest building next door and use the golden ratio of proportions to the total height of the sculpture and you will see that the proposed height is close to where it should be in my opinion.

REQUESTED ACTION:

Staff recommends the Board discuss, provide direction to staff, and consider voting to formally accept the project design and make a final recommendation on the size/scale of the sculpture at the Commissioners Regular Meeting on August 9th, 2021.

This action by the Board of Commissioners will trigger the BGC to move forward. The BGC have constructed a timeline for installation to occur before March 2022 as they have a dedication weekend planned with the Maritime Museum.

EXPECTED LENGTH OF PRESENTATION:

10 minutes

SUBMITTED BY:

Rachel Johnson, Public Information Officer & Parks and Events Coordinator

BUDGET AMENDMENT REQUIRED:

No



July 26, 2021

Dear Beaufort Town Commissioners,

The Beaufort Garden Club and the members of the Garden Club Public Art Committee are very pleased to have had the opportunity to work on the proposed “Menhaden Melody” sculpture project for Topsail Park.

When voting on the final approval we ask that you consider the following:

- Artist Kirk Davis specifically used the design ratio of 2/3 sculpture and 1/3 base. This is known as “the Golden mean” of proportion.
- A taller base allows for visibility from the water and from Moore Street.
- A taller base allows space for inscription - for the dedication, and the recognition of donors to be on the base rather than on separate signage.
- A taller base will discourage climbing.
- A taller base allows the sculpture to be scaled proportionally with respect to the monumental building to its west.

We ask that, as proposed, that you approve a 3 – 4 foot high base for “Menhaden Melody.”

Thank you.

Respectfully submitted on behalf of the Garden Club Public Art Committee,

Cindy Cash, chair

Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Items for Discussion and Consideration

SUBJECT: Middle Passage Marker Project

BRIEF SUMMARY:

The Town of Beaufort has been identified by the Middle Passage Ceremonies and Port Markers Project, Inc. and the North Carolina African American Heritage Commission, as a place of arrival for enslaved Africans directly from the African coast. Two arrival sites have been designated as a Site and Itinerary of Memory as a part of the United Nations Educational, Scientific and Cultural Organization's (UNESCO) Slave Route Project. The two sites identified in Beaufort are Topsail Park and the former location of the Market Street Wharf (south end of Turner Street).

There are 5 cities/towns in North Carolina that have been identified through this project. If this project is approved to move forward, Beaufort would be the first town to recognize and honor the Middle Passage Project in NC.

In 2019, a group of local citizens began looking into a potential Middle Passage Marker Project. The current committee was formed as a result, funding was secured, and research was conducted. The attached presentation contains a marker design along with research and letters of support from a variety of local, State and National organizations.

The Middle Passage Project Committee has raised funding to pay for the sign and the installation **at no cost to the Town.**

The Middle Passage Project Committee presented the attached information to the Beaufort Parks & Recreation Advisory Board on July 1 due to the requested location being a Town Park.

The Parks & Recreation Board (PRAB) *unanimously* supported the project and applauded the research that has gone into it. The PRAB voted on and made the following recommendations for the Board of Commissioners to consider in response to each of the applicant's requests as outlined in the attached presentation:

- Recommends the Town consider placement at Topsail Park
- Recommends the Board of Commissioners consider designating Aug. 23 the United Nations' Day of Remembrance and consider an annual Remembrance Ceremony
- Recommends the Town consider a dual dedication of Topsail Park as both a Memorial Park to the African Ancestors as well as to the Menhaden Fishing Industry in

conjunction with the existing art project by the Beaufort Garden Club. The Parks Board feels there is adequate space in the Park for both projects.

- Recommends the possibility of future consideration of a memorial monument in a public space to honor African Ancestors.

Next Steps:

This project, if approved by the BOC to move forward, will be required to receive approval from the Historic Preservation Commission, through a Certificate of Appropriateness (COA). The applicant on the COA would be listed as the Middle Passage Project. Staff is requesting, if the BOC approves the project, to authorize staff to list the Town on the COA application.

Members of the Middle Passage Project Committee are available to answer questions and provide further information on the project and the research.

ATTACHMENTS:

- Middle Passage Project Proposal Slideshow
- Supporting letters
- Supporting Research/documentation

REQUESTED ACTION:

Staff recommends the Board discuss, provide direction to staff, and consider the following:

- Consider approving the project for placement of a historical marker in Topsail Park to recognize the Middle Passage Project.

- Consider designating Aug. 23 the United Nations' Day of Remembrance and consider an annual Remembrance Ceremony.

- Consider dedication of Topsail Park as a Memorial Park to the African Ancestors.

- Consider the possibility of a future memorial monument to be featured in a public space.

This project, if approved by the BOC to move forward, will be required to receive approval from the Historic Preservation Commission, through a Certificate of Appropriateness (COA). The applicant on the COA would be listed as the Middle Passage Project. Staff is requesting, if the BOC approves the project, to authorize staff to list the Town on the COA application.

EXPECTED LENGTH OF PRESENTATION:

20 minutes

SUBMITTED BY:

Rachel Johnson,

Public Information Officer & Parks and Events Coordinator

BUDGET AMENDMENT REQUIRED:

No

REQUEST TO DEDICATE TOPSAIL PARK AND ERECT A MIDDLE PASSAGE MARKER

Submitted By: The Middle Passage Project Committee

Presented By: Heather Walker



BACKGROUND & INTRODUCTION

BEAUFORT, NORTH CAROLINA AND THE TRANS-ATLANTIC HUMAN TRADE

Beaufort, North Carolina, was a Port-of-Call in both the Trans-Atlantic and Trans-American human trade. The **Middle Passage Ceremonies and Port Markers Project, Inc.** and the **North Carolina African American Heritage Commission** have identified Beaufort, North Carolina, as a place of arrival for enslaved Africans directly from the African coast. The arrival sites located in Beaufort have been officially designated as a Site and Itinerary of Memory as part of **UNESCO's Slave Route Project.**

WHAT IS THE DIFFERENCE BETWEEN THE TRANS-AMERICAN (DOMESTIC) AND THE TRANS-ATLANTIC HUMAN TRADE?

Trans-American (Domestic)

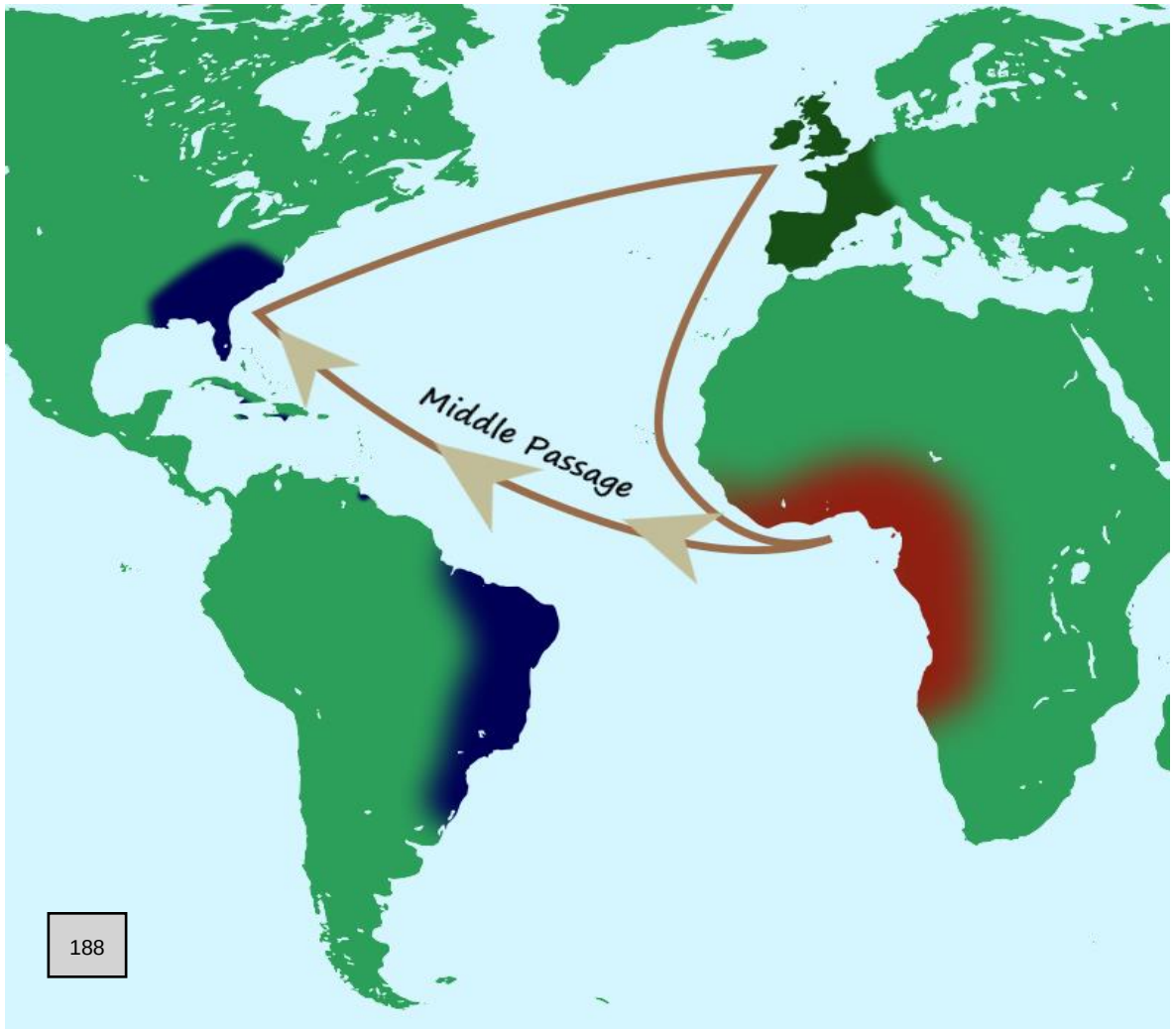
- The trafficking of enslaved African people from one location in the Americas to another

Trans-Atlantic

- The trafficking of enslaved African people directly from the coast of Africa to the Americas

WHAT IS THE MIDDLE PASSAGE?

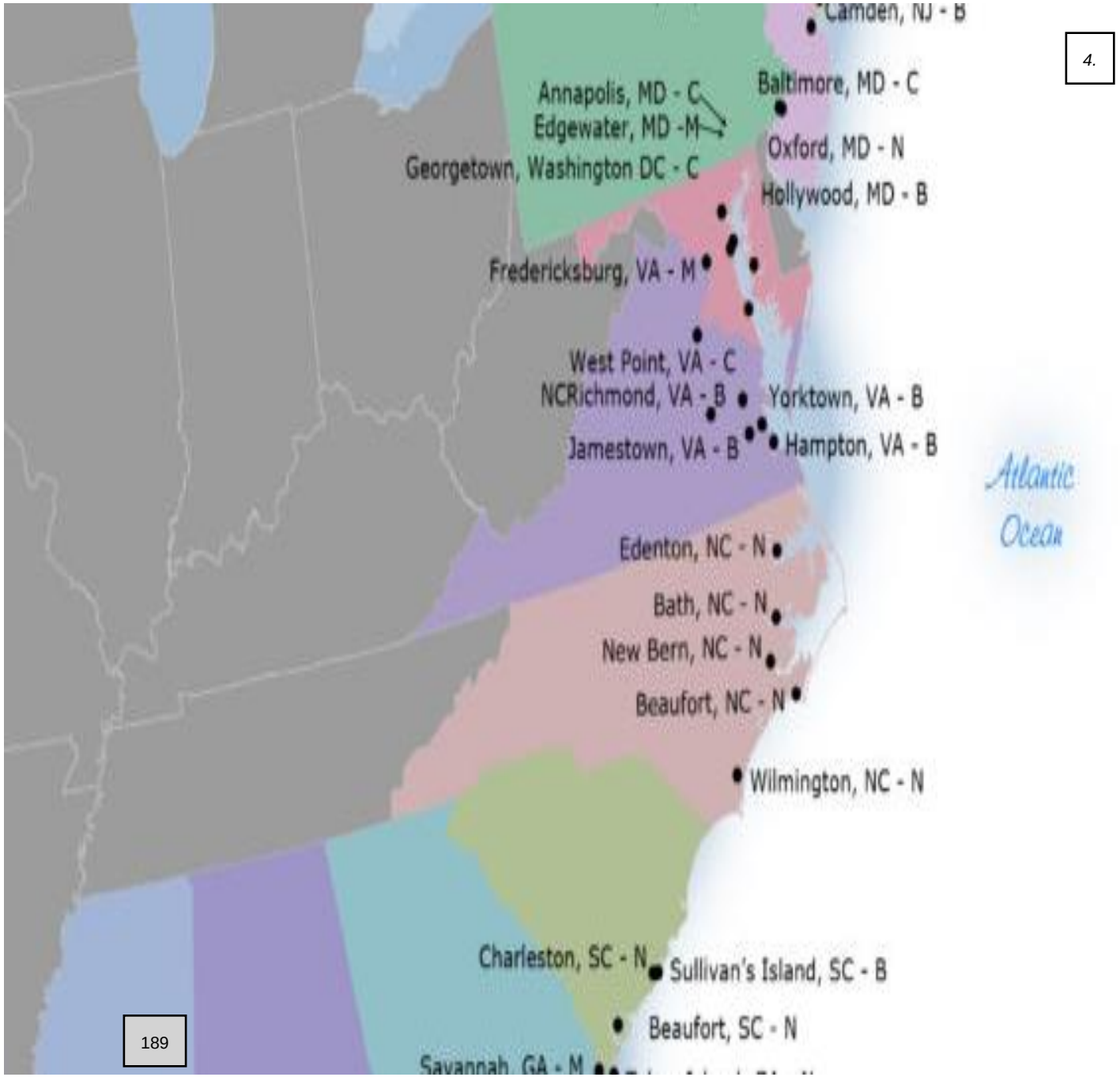
The Middle Passage is the **route** used in the trafficking of enslaved Africans across the Atlantic Ocean to the Americas



THERE ARE FIVE CITIES/TOWNS WITH DOCUMENTED SITES OF ARRIVAL IN NORTH CAROLINA

- Edenton
- Bath
- New Bern
- Beaufort
- Wilmington

★ If approved, Beaufort will be the first town in North Carolina to place a marker acknowledging an arrival site. ★



WHAT IS UNESCO?

- **UNESCO** stands for the **United Nations Educational, Scientific and Cultural Organization.**
- It is a specialized agency of the United Nations (UN) aimed at promoting world peace and security through international cooperation in education, the sciences, and culture.
- Only sites of **international** significance receive UNESCO designation.
- The Statue of Liberty is also a UNESCO designated site



ELEMENTS OF THIS PROJECT



Map by Henry Mouzon 1775

Remembering Our Ancestors

African Presence and the Middle Passage

Beaufort, North Carolina, was involved in the Trans-Atlantic human trade and is a documented Middle Passage arrival site.

Enslaved people disembarked at or near this exact location, now called Topsail Park. Records from 1769 show that one particular ship transported thirty-six Africans directly from the coast of Africa to the Port of Beaufort, North Carolina. The ocean voyage, known as the Middle Passage, was a treacherous and brutal journey. It was part of the largest forced migration in human history; twelve million Africans were captured and taken from their homeland. Approximately two million Africans perished during the journey to the Americas. Their remains lie at the bottom of the Atlantic Ocean.

The men, women, and children who survived the voyage of the Middle Passage disembarked here and were sold into chattel slavery for the purpose of profit and development of this town and nation.

Over the centuries, these men and women, and their descendants made possible the agricultural and maritime commercial development of the region, with special emphasis on the menhaden and turpentine industries.

Although these enslaved people have departed from this life, their descendants have continued to contribute to the town's success, culture, and community in countless ways.

As a documented arrival site, Beaufort, North Carolina has been designated as a Site and Itinerary of Memory by the UNESCO Slave Route Project.

United Nations Educational, Scientific and Cultural Organization

Site of memory associated to The Slave Route Resistance, Liberty, Heritage

The UNESCO Slave Route project: Resistance, Liberty, Heritage

Launched in 1994, the international and inter-regional project 'The Slave Route: Resistance, Liberty, Heritage' addresses the history of the slave trade and slavery through the prism of intercultural dialogue, a culture of peace and reconciliation. It thereby endeavours to improve the understanding and transmission of this human tragedy by making better known its deep-seated causes, its consequences for societies today and the cultural interactions born of this history. The project is structured around five key fields of activity: scientific research, development of educational materials, preservation of written archives and oral traditions, promotion of living cultures and contributions by the African diaspora and, lastly, preservation of sites of memory.

The promotion of the memorial heritage related to the slave trade and slavery plays a decisive role not only in educating the general public, and young people in particular, but also in facilitating national reconciliation and social cohesion processes in societies.

It is in this perspective that The Slave Route project has created a label to encourage the preservation of sites of memories and the establishment of itineraries that can tell this story and ensure that this heritage receives due attention at the national, regional and international levels.

This site fulfils the quality criteria set by the UNESCO Slave Route Project in conjunction with the International Network of Managers of Sites and Itineraries of Memory.

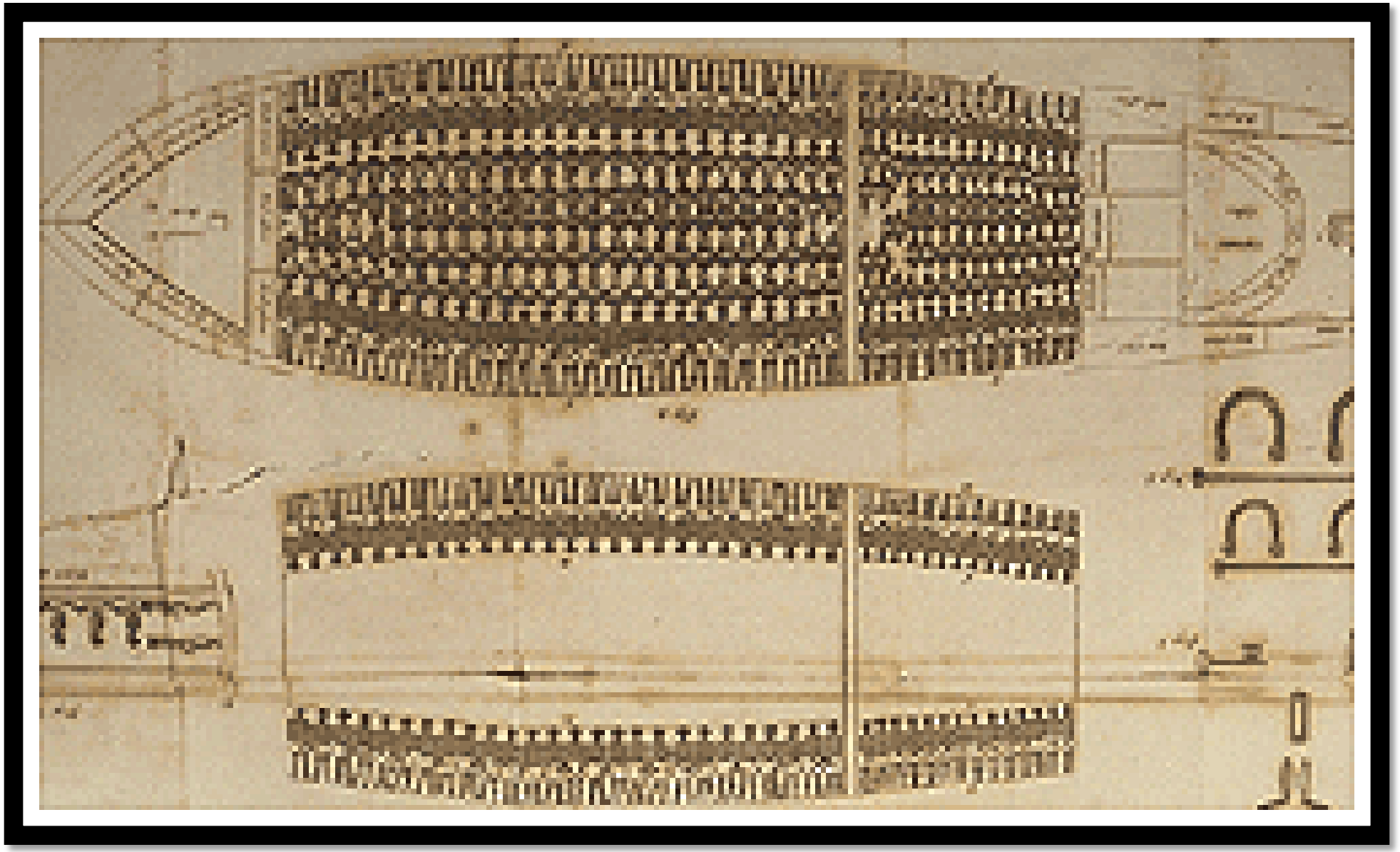


Image Courtesy: Library of Congress

This drawing shows the way in which ens[195]d Africans were packed into ships for the journey through the middle passage.

Entered in Port-*Beaufort*, from the 1ſt of *October* 1763, to the 1ſt of *October* 1764, the following Veſſels, *viz.*

2 Ships,	72 Sloops,	
1 Snow,	43 Schooners,	
9 Brigs.		
	In all	127

Imported in the ſaid Diſtrict, between the 1ſt of *October* 1763, and 1ſt of *October* 1764.

320 Hhds. Rum,	352 Barrels Flour,
318 Do Molaſſes,	1972 Do of Bread,
342 Bar. brown Sugar.	28000 lbs. of Iron,
18160 lbs. Loaf Do	179 Slaves,
40 Caſks of Wine,	2479 lbs. of Cheeſe,
913 Barrels Cyder,	96 Barrels of Beer,
10865 Buſhels Salt,	1600 lbs. of Flax,

Excluſive of *European* Goods, Coffee, Tea, &c.

Clipped from:
The New Bern Gazette 1764

EXECUTOR'S SALE

OF

Slaves.

WE will sell, at Public Auction, on the 1st day of January 1850, at the Court House in Beaufort, the following named slaves, belonging to the Estate of JAMES W. HUNT, decd. Margaret, and her female child; this woman is about 21 years old, very healthy, a good cook, washer, and ironer; her child is nearly two years old. A young negro man about 21 years old, named Bate, a good turpentine hand, and accustomed to farm work. A very likely boy named Clinton, now in his eleventh year. The above named Slaves will be sold on a Credit of six months. Notes with approved security will be required, with interest from the date.

JECHONIAS PIGOTT.
M. B. ROBERSON,
J. MANNEY,
RALPH HOWLAND,
} Executors.

Beaufort Dec. 12th 1849. ——50—1w.

Clipping from:
The Eastern Carolina Republican
(New Bern, NC) 1849

CONCLUSION

CONCLUDING STATEMENTS

- Having United Nations' UNESCO designation and recognition means these Sites and Itineraries of Memory are worthy to be set aside for the remembrance of the Africans who perished on the journey through the Middle Passage. From a moral and an educational standpoint, it is important that we acknowledge our past. Although a dark period in history, it *is* our history, nonetheless. Acknowledgement is part of the process of Beaufort's truth-telling, justice, and healing.

- Historical documents reveal the remains of at least 50 captive Africans, on one vessel brought from Barbados, were tossed directly into the waters at the Port of Beaufort, now called Topsail Park. This history needs to be acknowledged where it occurred.

- This place is not only significant in history, but also in our community. Dedicating this space enables members of our community, both black and white, to reflect on the events that took place here and to pay homage to those that came before us.

REQUESTS FOR CONSIDERATION

The Middle Passage Port Marker Project Committee respectfully asks the Town of Beaufort Board of Commissioners to consider the following requests:

- Permission to place the proposed marker, designed by members of the community, at Topsail Park
- Designate August 23, the United Nations' Day of Remembrance, for a Remembrance Ceremony to be held annually at Topsail Park
- Dedicate Topsail Park as a Memorial Park to the African Ancestors
- Consider placement of a memorial monument at Topsail Park or another public space to honor our African Ancestors

MARKER DESIGN & SPECIFICATIONS

Remembering Our Ancestors

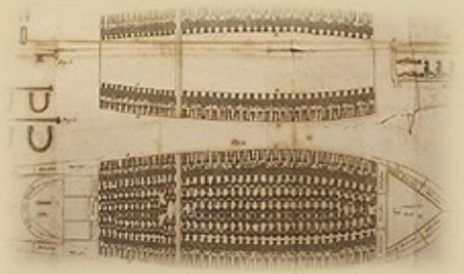
African Presence & The Middle Passage

Middle Passage Ceremonies
and Port Markers, Inc.
Remembering The Ancestors



Beaufort, North Carolina, was involved in the Trans-Atlantic human trade and is a documented Middle Passage arrival site. Enslaved people disembarked at or near this exact location, now called Topsail Park. Records from 1769 show that one particular ship transported thirty-six Africans directly from the coast of Africa to the Port of Beaufort, North Carolina.

The ocean voyage, known as the Middle Passage, was a treacherous and brutal journey. It was part of the largest forced migration in human history; twelve million Africans were captured and taken from their homeland. Approximately two million Africans perished during the journey to the Americas. Their remains lie at the bottom of the Atlantic Ocean.



The men, women, and children who survived the voyage of the Middle Passage disembarked here and were sold into chattel slavery for the purpose of profit and development of this town and nation.


EXECUTORS SALE
of
Slaves.



Over the centuries, these men and women, and their descendants made possible the agricultural and maritime commercial development of the region, with special emphasis on the menhaden and turpentine industries.

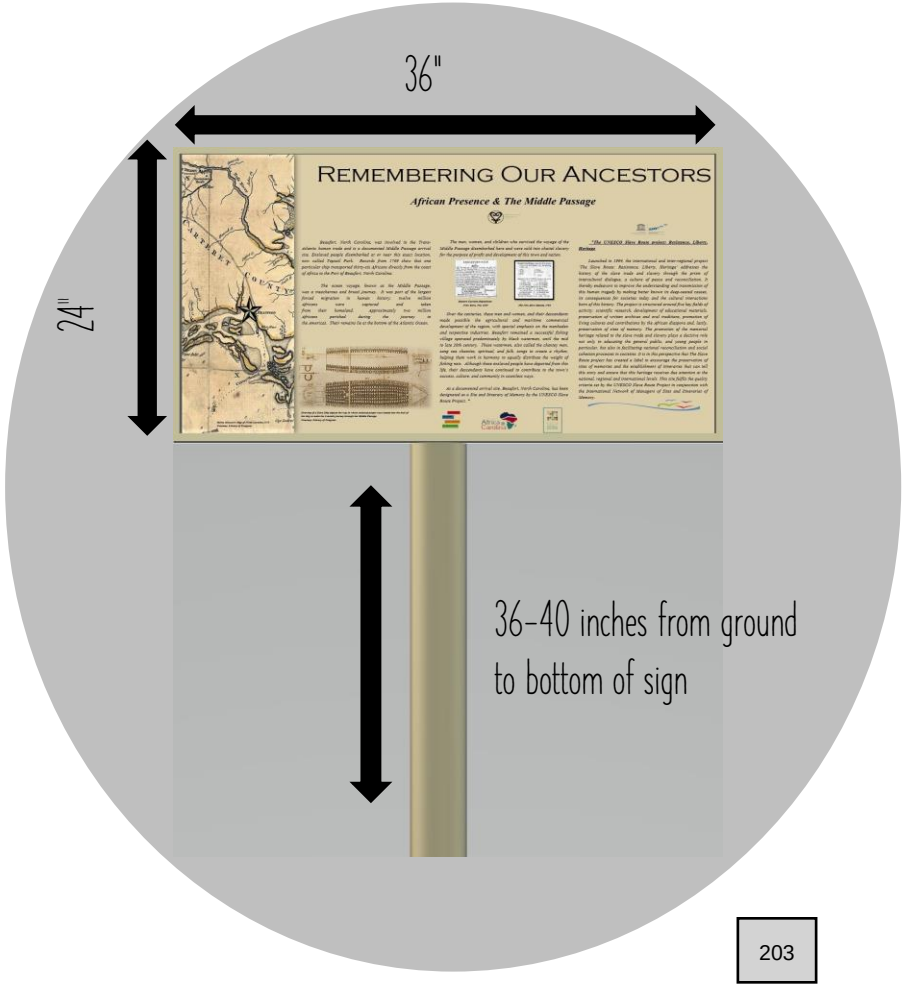
Although these enslaved people have departed from this life, their descendants have continued to contribute to the town's success, culture, and community in countless ways.

As a documented arrival site, Beaufort, North Carolina, has been designated as a Site and Itinerary of Memory by the UNESCO Slave Route Project.

The UNESCO Slave Route Project:
Resistance, Liberty, Heritage

Launched in 1994, the international and inter-regional project 'The Slave Route: Resistance, Liberty, Heritage' addresses the history of the slave trade and slavery through the prism of intercultural dialogue, a culture of peace and reconciliation. It thereby endeavors to improve the understanding and transmission of this human tragedy by making better known its deep-seated causes, its consequences for societies today and the cultural interactions born of this history. The project is structured around five key fields of activity: scientific research, development of educational materials, preservation of written archives and oral traditions, promotion of living cultures and contributions by the African diaspora and, lastly, preservation of sites of memory. The promotion of the memorial heritage related to the slave trade and slavery plays a decisive role not only in educating the general public, and young people in particular, but also in facilitating national reconciliation and social cohesion processes in societies. It is in this perspective that The Slave Route project has created a label to encourage the preservation of sites of memories and the establishment of itineraries that can tell this story and ensure that this heritage receives due attention at the national, regional and international levels. This site fulfils the quality criteria set by the UNESCO Slave Route Project in conjunction with the International Network of Managers of Sites and Itineraries of Memory.

Marker Mount Specifications



24"x 36" sign

36"- 40" pedestal height

Angled mount style (prevents obstruction of water-view)



RENDERING OF PROPOSED MARKER IN PLACE AT TOPSAIL PARK

- There are several ideal locations within the park area for marker placement.
- This photo shows the marker placed near the sidewalk for passers-by to view easily.

PROJECT MEMBERS & COMMUNITY SUPPORT

MIDDLE PASSAGE PROJECT ADULT COMMITTEE MEMBERS

- Francesca Quinn, Newport
- Tyrone Fleshman, James City
- Heather Walker, Beaufort
- LaShone Jones, Morehead City
- Jane Hines, Beaufort
- Kerry Peay, Winston-Salem
- Charles McDonald, Beaufort
- Donnell Johnson, Greenville
- Joanna Knight, Havelock
- Shawn Robinson, Beaufort
- Melvin Cooper, Beaufort
- Justin Wallace, Beaufort
- Amanda Crooms, Beaufort
- Regina Johnson, Beaufort
- Kisha Simmons, Beaufort

YOUTH COMMITTEE MEMBERS

- Sarah Walker, Beaufort
- Anthony Walker, Beaufort
- K'ryah Reels, Beaufort
- Sabre Tepatate, Beaufort
- Mackenzie Morehead, Beaufort
- Nyema George, Beaufort
- CeCe Johnson, Beaufort
- Charles Matheka, Beaufort
- Shamel Baker, Beaufort
- Julian George, Beaufort

SUPPORTING INDIVIDUALS

- Airyel Rothrock
- Aja Davis
- Andrea Murray
- Ann Wallace
- Annie Henry
- Arlene Fisher
- Beverly James
- Bobby Chambers
- Carrie Johnson
- Carsell Walker, Jr.
- Charles McDonald
- Craig Stanley
- Crystal Brown
- David Krueger
- Derrick Partee
- Donovan Henry
- Doug Miron
- Douglas George
- Eddie Murrell
- Elisa Orianna
- Evelyn Johnson
- George Henry
- Gilbert Powell
- Grace Ellison
- Henry Everett
- Henry McLane
- Isaac Teel
- Jack Garrison
- James Futrell
- Jane Hines
- Jerry Cox
- Jerry Wilson
- Jessica McLane
- Lakesha George
- Latescheca Johnson
- Laveria Pritchett
- Laverne Johnson
- Lee Stiles
- Lillian[illegible]nley
- Lillian Walker
- Margaret Powell
- Marvin Windley
- Montravias King
- Monty Ellison
- Patrick Simmons
- Perry Harker
- Porsha Partee
- Robert Wallace
- Roger James
- Scott Walker
- Sharon Harker
- Shaun Smith
- Sonya Henry
- Stephanie Hillsgrave
- Tammy Krueger
- Taylor James
- Teresa Parker
- Tia Crooms
- Timothy Wallace
- Timothy Wallace, Jr.
- Tyisha Teel
- Victoria Washington
- William Ellison
- William George Henry
- Yolanda Murray

SUPPORTING ORGANIZATIONS

- Middle Passage Ceremonies and Port Markers Project, Inc.
- Eastern Carolina Foundation for Equity and Equality
- North Carolina African American Heritage Commission
- Queen Street Missionary Baptist Church
- Helpful Movers
- Within My Budget Furniture
- Queen Street Heritage Foundation
- Operation Uplift II
- Wilson's Clipper and Barber Styling
- Thriftique Boutique
- Crystal Clean Cleaning Service
- HippoRed Mfg. Co
- National Park Service
- CCBS and Sign Shop
- Old Town Taxi
- James City Historical Society
- African American Caucus of the North Carolina Democratic Party Forsyth County Social Justice and Policing Reform Committee
- Progressive Caucus of the North Carolina Democratic Party Policing Reform Committee
- Mt. Shiloh Missionary Baptist Church
- Ellison Realty
- Hope Insurance
- Minority Vendor Networking
- D.R.E.A.M., Inc.
- Visions Community Outreach
- UNESCO
- Mastermind Image Photography
- Hope 4 Today Consulting
- Opulent Ambience

Africa to Carolina: N.C. Ports and the Importation of Enslaved Persons

Abstract:

- North Carolina had five ports of entry (customs districts) during the colonial era. In the Port Brunswick district, customs collection and trade shifted to Wilmington following the destruction of the town of Brunswick in 1776.
- Available numbers for the number of enslaved person imported into North Carolina by sea are incomplete, and a full compilation will accordingly remain elusive.
- Importation of enslaved persons directly from Africa to North Carolina was rare. Following clearance through port customs, some enslaved persons disembarked "up river" or at other destinations.
- State law prohibited importation of enslaved persons in 1794, leading to an increase in intrastate trade.

The importation of enslaved persons into North Carolina began far back in the colonial era to the days of Spanish exploration. Enslaved persons accompanied the expedition of Hernando de Soto into the interior in 1540 while others were probably part of the Juan Pardo expeditions from 1566 to 1569. In 1654, employees of Virginia explorer Francis Yeardley were told by the Tuscarora Indians of a Spaniard who lived in their territory, possibly engaged in mining, whose large household included seven people of African descent. Perhaps the earliest reference to the presence of enslaved persons during the period of English colonization that began under the Lords Proprietors is in a September 1663 headright of 300 acres at "New begin Creek" granted to a Phillip Evans; among the six persons listed for transportation to the colony of Carolina under the headright was a man listed as "Tony Negro."[1] The headright system had been established at the request of British colonists on Barbados, who wanted to settle in the new mainland colony and transport their slaves with them. The Proprietors granted settlers tracts of land of varying sizes based upon the number of enslaved persons brought into the colony within specific periods of time. The initial status of enslaved persons, as under the total dominion of their masters, was briefly established in the 1669 "Fundamental Constitutions of Carolina." Laws passed following the repeal of

[1] Lawrence A. Clayton, Vernon James Knight Jr. and Edward C. Moore, *The De Soto Chronicles: The Expedition of Hernando de Soto to North America in 1539-1543*, 2 vols. (Tuscaloosa: University of Alabama Press, 1993), II: 315, 326; Charles Hudson, *The Juan Pardo Expedition: Exploration of the Carolinas and Tennessee, 1566-1568, With Documents Pertaining to the Pardo Expedition Translated and Annotated by Paul E. Hoffman*, revised edition (Tuscaloosa: University of Alabama Press, 2005), 194-195; Caroline B. Whitley and Susan M. Trimble, compilers, *North Carolina Headrights: A List of Names, 1663-1744*, Colonial Records of North Carolina Special Series (Raleigh: Division of Archives and History, 2001), 5.

the "Fundamental Constitutions" in the late seventeenth century attempted to regulate all aspects of enslaved persons' lives.[2]

The subsequent growth of slavery within what is now North Carolina was hampered by the coastline and the lack of usable harbors, which made large-scale importation difficult and limited the size of a colonial population and a subsequent demand for slaves. As a result, slave importation was heavier within the portion of the original Carolina colony that is now South Carolina. References to the import of enslaved persons to North Carolina in colonial records are scattered, but they indicate that vessels carrying enslaved persons were arriving at least as far back as the 1680s. Entry was through one of five custom districts, referred to as "ports," that were established gradually throughout the colonial area, beginning with Port Roanoke, with the customs collector eventually based at Edenton. The other custom districts were Port Currituck, Port Bath (1716), Port Beaufort (1722), and Port Brunswick (1731). Of these, Port Currituck was the custom district with the least amount of maritime traffic of any sort, as the coastline was difficult, and there was no fixed town where the customs official regularly sat. Following the destruction of the town of Brunswick in 1776, the customs collector for the Port Brunswick district relocated his headquarters to Wilmington.[3]

The earliest direct record of the arrival of an enslaved person involves the departure of a black woman from Virginia on June 6, 1702, on the schooner *Ann* for Port Roanoke (Edenton). The majority of enslaved people imported into the colony and, later, the state, came from other colonies on the North American mainland, followed by individuals imported from the West Indies and other parts of the Caribbean. Direct importation of people from Africa occurred only occasionally. It should be noted, however, that the place from which enslaved persons were transported to North Carolina did not necessarily reflect an ultimate point of origin. While some of those who were brought into North Carolina from the Caribbean or from other mainland colonies may have been at least second-generation

[2] Jeffrey J. Crow, Paul D. Escott, and Flora J. Hatley Wadelington, *A History of African Americans in North Carolina*, Second Revised Edition (Raleigh: Office of Archives and History, 2011), 2-5; "The Fundamental Constitutions of Carolina," in William L. Saunders, ed., *The Colonial Records of North Carolina*, 10 volumes (Raleigh: State of North Carolina, 1886-1890), 1:204.

[3] Milton Ready, *The Tar Heel State: A History of North Carolina* (Columbia: University of South Carolina Press, 2005), 68-71; Walter E. Minchinton, "The Seaborne Slave Trade of North Carolina," *North Carolina Historical Review*, Vol. 71, No. 1 (January 1994):2; David Stick and John Hairr, "Ports and Harbors," in William S. Powell, ed., *Encyclopedia of North Carolina* (Chapel Hill: University of North Carolina Press, 2006), 899.

slaves, many may in fact have been born in Africa, brought to another colony, and then transported into North Carolina.[4]

In contrast to other Southern states, many of the colonial and early national records for the importation of enslaved persons into North Carolina did not survive. Many surviving entries are in the records for the five custom ports. There are large gaps in the records before the early 1720s. The most thorough account of the importation of enslaved persons into North Carolina is a 1994 article in the *North Carolina Historical Review* by British scholar Walter E. Minchinton. He combed through the surviving records of the customs ports, supplemented with other materials in British naval records, and broke down his findings into several detailed and useful tables, documenting his sources. The amount of information regarding the enslaved persons reported varies widely. Usually, only the number of individuals was noted, although sometimes only a numberless "parcel" of enslaved persons was recorded. Other records indicate only that a vessel brought enslaved people to North Carolina, but without designating at which customs port that they arrived. Additional records contain information about particular years but sometimes contradict each other on certain points, principally between British records and North Carolina custom port records. As a result, full and accurate information regarding the number of enslaved persons brought into North Carolina by sea is impossible. Enough information does exist, however, to provide some detailed numbers for particular periods of time and for the ports in which individuals arrived.[5]

In general, the number of enslaved persons imported into the state by sea grew steadily over time, although importation dropped off sharply during wartime, or when blockade or enemy coastal raids severely disrupted or shut down trade, as in the various interrelated wars of the 1740s and, later, the American Revolution. Between 1702 and 1746 there are records for 319 enslaved persons transported into the colony by sea; 818 between 1749 and 1767; and 719 between 1768 and 1772. Records of vessels carrying enslaved persons into the colony document that 567 arrived between 1771 and 1775 and 993 between 1784 and 1790.[6]

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[4] Minchinton, "Seaborne Slave Trade of North Carolina," 5, 26; Ready, *Tar Heel State*, 72-73.

[5] Minchinton, "Seaborne Slave Trade of North Carolina," 2-5, 6 (Table 1), 8 (Table 2), 10 (Table 3), 11 (Tables 4 and 5), 16 (Tables 6 and 7), 18 (Table 8), 22 (Table 9), 26-38 (Appendix 1), 39-42 (Appendix 2), 43-55 (Appendix 3), 56-58 (Appendix 4). In addition, it is possible that the majority of slaves imported into the state may have been brought in overland rather than by sea. Ready, *Tar Heel State*, 71. If so, there would have been no comparable recordkeeping system to note their arrival.

[6] Ready, *Tar Heel State*, 69; Minchinton, "Seaborne Slave Trade of North Carolina," 8-17; for the relevant tables, see 6 (Table 1) 7, 8 (Table 2), 10 (Table 3), 11 (Tables 4 and 5). There is obviously an overlap between the 1768-

The surviving records indicate that between 1702 and 1746 at least 35 enslaved persons were imported from the West Indies, 1 from Maryland, 29 from New York, 7 from New Jersey, 25 from Virginia, and 224 from Charleston. Between 1749 and 1767, it is documented that 422 enslaved persons were transported to North Carolina from Jamaica, 2 from the Bahamas, 26 from Barbados, 3 from Grenada, 14 possibly also from Grenada or perhaps from one or more other West Indies islands, 19 from Massachusetts, 45 from South Carolina, 6 from New Hampshire, 3 from Rhode Island, 258 from Africa, and 20 from an unknown port. From 1768 through 1772, the British Board of Customs and Excise for America indicate that 43 enslaved persons were imported into the state from Africa, 565 from the West Indies, and 111 from other British mainland colonies. Of these, Port Brunswick received 7 enslaved persons from Africa, 214 from the West Indies, and 72 from other mainland colonies; Port Beaufort, 36 persons from Africa, 142 from the West Indies, and 6 from other mainland colonies; and Port Roanoke, 207 from the West Indies (including two persons imported into Bath, who were for some reason included in the Port Roanoke records), and 17 from other mainland colonies. The port registry records for 1771 from 1775, which are far from complete and in some cases damaged, show that at least 203 enslaved persons were carried into the Port Brunswick from the West Indies, 39 from Charleston, and 60 from undocumented sources; Port Roanoke received 203 from the West Indies; and various unnamed ported received at least 24 persons from the West Indies, 38 from Virginia, and "a parcel" from Africa. Post-Revolutionary records show that Port Bath received at least 8 enslaved persons in 1788-1789; Port Beaufort 222 enslaved persons in 1786-1789; Port Brunswick 411 persons between 1784-1790; Port Currituck received twelve enslaved persons in 1787; Port Roanoke 323 enslaved persons in 1786-1788;

1772 figures and the 1771-1775 figures provided by Minchinton involving the years 1771-1772. This involves the different sources that he used to compile the records, which illustrate the difficulties in trying to reconcile and correlate the disparate records involved. The 1768-1772 figures were compiled from information in the Board of Custom and Excise Records, America, in the British National Archives (formerly the PRO or Public Records Office). The 1771-1775 figures were compiled from a number of sources, including the records of the ports in the State Archives. The British records show a total of eighty-two slaves imported into the colony in 1771 and 155 for 1772, while the vessel records from the North Carolina customs ports show sixty-eight arriving in 1771 and 112 in 1772. The discrepancies are due to the incomplete nature of the records. For 1771 and 1772 there are Board of Customs and Excise records for the Ports of Brunswick, Beaufort, and Roanoke, while for 1772 there are North Carolina shipping registry records for Port Roanoke only, with an additional thirty-eight arrivals listed for unspecified North Carolina ports in 1771 and six in 1772. In the case of Port Roanoke, the Board of Customs and Excise records show thirty-one enslaved persons imported into Port Roanoke in 1771 and 106 in 1772. North Carolina shipping registry records for Port Roanoke indicate the arrival of thirty enslaved persons in 1771 and 106 in 1772 – a difference of only one person from the British Customs records. Thus, the discrepancy is the result of the incomplete nature of the shipping registry records for the other ports, which prevent a proper correlation of the two sets of records.

and that there were at least 13 other enslaved persons brought into the state at undocumented ports in 1785 and 4 in 1788.[7]

The ship registry records for the custom ports sometimes provide additional information regarding those who were brought involuntarily into North Carolina; these records are conveniently abstracted in the appendices of Minchinton's article and broken down on a ship-by-ship basis. For example, on May 1, 1772, the sloop *Nancy* arrived at Port Roanoke from Antigua and St. Martins carrying 12 "seasoned negroes," indicating that they had had prior plantation labor experience. Others indicate gender and age information, as in the arrival of the schooner *Friendship* at Port Beaufort on July 18, 1787. Two groups of enslaved persons (belonging to different owners) were on the ship: one group consisting of 4 females and 2 males between the ages of 12 and 30, 3 girls between the ages of 7 and 12, and 4 children under 7; the other group consisting of one female between the age of 12 and 30, a boy and a girl between the ages of 7 and 12, and 3 children under 7. Others list the cost of purchase. On June 10, the brig *Camden* arrived in the Port Roanoke (Edenton) customs district with 80 enslaved persons from Africa, purchased at a cost of £2,844. In the *Camden* case, the final destination of the enslaved persons is known, as other records indicate that they were purchased by the Lake Company to dig a canal between the Scuppernong and Lake Phelps as part of the development of the Somerset plantation. Unfortunately, the amount of such details varies widely from record to record.[8]

The records of slave importations into the state cease after 1790, as the state government took steps to end the importation of enslaved persons into the colony. These measures were in response to upheavals to the planter system caused by the American Revolution and its impact throughout the world. As early as 1786, a tax was levied on the importation of enslaved persons into North Carolina at a time when slaveholders were attempting to recoup their losses from runaways during the war. The tax was repealed in 1790, and the black population of the state grew rapidly. In the meantime, the Atlantic world was rocked by the French Revolution, more radical than its American counterpart. One of the aftershocks of the French Revolution was the slave revolt which began in August 1791 in the French colony of Sainte-Domingue, which led to the creation of the Republic of Haiti, a development that caused alarm throughout the plantation South and heightened fears of potential slave rebellions within the United States itself.

[7] Minchinton, "Seaborne Slave Trade of North Carolina," 6 (Table 1) 7, 8 (Table 2), 10 (Table 3), 11 (Tables 4 and 5).
[8] Minchinton, "Seaborne Slave Trade of North Carolina," 39, 48; Dorothy Spruill Redford with Michael D'Orso, *Somerset Homecoming: Recovering a Lost Heritage* (New York: Doubleday, 1988), 138-135.

The North Carolina political and social establishment was far from immune to these fears. In 1794, the state legislature passed an act prohibiting the importation of enslaved persons and black indentured servants by land or sea beginning on May 5, 1795. A fine would be levied on any person who violated the law in the form of £100 per enslaved person or black indentured servant imported. The law would not prohibit American citizens who moved to North Carolina from other states from bringing their slaves or black indentured servants with them, as long as they took an oath affirming that they were not bringing anyone into the state for the express purpose of sale. In the following year, a second law was passed against any person emigrating into North Carolina from the West Indies or from any of the Dutch, French, or Spanish settlements along the south Atlantic coasts, from bringing with them any blacks or other "people of colour" over the age of 15. Any who did so would be charged £100 pounds for each person brought in violation of the act. Any emigrants who brought anyone under 15 had to attest to the age of each individual by oath. These laws shut down the importation of enslaved persons into North Carolina over ten years before the constitutional abolition of the importation of slaves into the United States went into effect in 1808, although the slave trade within the state continued.[9]

While the surviving records give an imperfect picture of the level of slave importations into North Carolina, they do provide enough information to some degree of documentation as to the level of importation into four of the five custom ports, Port Currituck being the weak link not only due to the lack of documentation but also to the fact that there was not one designated town for the conduct of customs duty. Nevertheless, there is enough surviving information to serve as the basis for establishing markers or monuments within the state commemorating those persons who were brought into North Carolina against their will.

[9] Minchonton, "Seaborne Slave Trade of North Carolina," 17, 19; Crow et al., *History of African Americans in North Carolina*," 41-47; "An Act to Prevent the Further Importation and Bringing of Slaves and Indentured Servants of Colour Into This State," *Laws of North-Carolina: 1794*, [1]-2; "An Act to Prevent Any Person Who May Emigrate from Any of the West-Indies or Bahama Islands, or the French, Dutch or Spanish Settlements of the Southern Coast of America, From Bringing Slaves into this State, and Also for Imposing Certain Restrictions on Free Persons of Colour Who May Come Hereafter into this State," *Laws of North Carolina: 1795*, 10-11; Alan D. Watson, ed., *African Americans in Early North Carolina: A Documentary History* (Raleigh: North Carolina Office of Archives and History, 2005), 3-4. Additional provisions of the 1795 act called for any free blacks who moved into the state or any enslaved persons emancipated within the state to provide a security bond of good behavior to the state of two hundred pounds for the time that they remained within North Carolina; provided information on how all fees and fines connected with the various actions were to be collected via the county court system; and detailed the circumstances in which the Militia would be called out in response to violent acts committed by bands of armed slaves or free blacks; the latter provision in particular reflects the unease caused by the Sainte-Domingue rebellion.

PROGRESSIVE CAUCUS of the NC Democratic Party

June 28, 2021

Dear Town of Beaufort Board of Commissioners,

Representing the membership of the Progressive Caucus of the NC Democratic Party, I'm writing to support the proposal submitted by The Middle Passage Project Committee to erect a marker acknowledging the town's role in the Trans-Atlantic Slave Trade, to dedicate Topsail Park as a memorial park to the African ancestors, and to consider permission for placement of a memorial monument in the future.

We've all long known that enslavement of Africans is an important part of our country's history. As we grapple now with the struggle for justice for African Americans, it is important that we recognize that history — in all its horror — and that we also recognize that the labor and the skills of enslaved Africans and their descendants made possible much of the commercial development of our state. We owe it to those slaves and their descendants to recognize and teach what happened. We owe it to all Americans to learn from the past so that we may strive to improve the future.

I hope one day soon to be able to visit Beaufort and see a marker recognizing the Middle Passage arrival site.

Respectfully,

Lee R. Nackman
President
Progressive Caucus of the North Carolina Democratic Party

United Nations
Educational, Scientific and
Cultural Organization

Organisation
des Nations Unies
pour l'éducation,
la science et la culture

Organización
de las Naciones Unidas
para la Educación,
la Ciencia y la Cultura

Организация
Объединенных Наций по
вопросам образования,
науки и культуры

منظمة الأمم المتحدة
للتربية والعلم والثقافة

联合国教育、
科学及文化组织

The Assistant Director-General for
Social and Human Sciences

Ms Ann L. Chinn
Chair
Executive Director
Middle Passage Ceremonies and
Port Markers Project
P.O. Box 3071
Jacksonville, Florida 32206
United States of America

12 December 2018

Ref. SHS/PPD/HMD/18/9692

Dear Ms Chinn,

I would like to thank you for your letter of 11 August 2018 transmitting the requests of local authorities for permission to use the "Site of memory associated with the UNESCO Slave Route project" logo.

UNESCO warmly welcomes this initiative, which endeavours to protect and promote the sites of deep significance. It demonstrates the important contributions made by African Americans to the historical and cultural heritage in those areas where the captive Africans arrived. It also offers an opportunity to publicize the remarkable achievements of African American communities in struggling for dignity and freedom and preserving their history and memory.

Given the symbolic impact of these sites, and within the commemoration of the 400th Anniversary of the Arrival of the First Captive Africans in the British North American Colonies in 1619, I am pleased to inform you that the 'Site of memory associated with the UNESCO Slave Route Project logo' is granted for all the sites listed by Middle Passage Ceremonies and Port Markers Project in the attached document.

Please find enclosed the logo to be used on the sites and all materials linked to the project, as well as the official text on the Slave Route that should accompany the logo when they are displayed at each site. This label is granted only for these sites and should not be confused with UNESCO Patronage, which necessitates a different procedure to be granted.

Wishing every success to your project and looking forward to receiving information on the events to be organized at these sites, I remain,

Yours sincerely,

Nada Al-Nashif

cc: Permanent Delegation of the United States of America to UNESCO
U.S. National Commission for UNESCO

7, place de Fontenoy
75352 Paris 07 SP, France
Tél. : +33 (0)1 45 68 03 48

www.unesco.org

United States Department of the Interior

NATIONAL PARK SERVICE
Cape Lookout National Seashore
131 Charles Street
Harkers Island, North Carolina 28531

IN REPLY REFER TO:

June 15, 2021

Dear Town of Beaufort Historic Preservation Commission,

On behalf of the National Park Service (NPS), I would like to express our support for the Eastern Carolina Foundation for Equity and Equality and the Middle Passage Marker Committee's efforts to place a marker and dedicate Topsail Park, in Beaufort, North Carolina, as a documented Middle Passage arrival site and an African American Heritage Site.

From as far north as Portsmouth (NH), down the eastern seaboard including New York (NY), Yorktown (VA), and Sullivan's Island (SC), westward through New Orleans (LA), over to Galveston (TX), and many places in-between, permanent Middle Passage Markers have been placed at, or near their documented arrival sites to create an inclusive space for education, reflection, and awareness. The town of Beaufort is one of approximately 48 documented ports of the slave trade that was part of the Middle Passage route.

In alignment with the Department of the Interior Secretary's goals, the National Park Service supports efforts that addresses racial inequality or honors their historic occurrence. The proposition of this marker and the proposed location appears to be close to the exact site of arrival based on historic record. The Topsail Park location incorporates many important features of an arrival site, not only for UNESCO's Slave Route Project, but for a potentially significant point for an African American heritage trail, like those preserved and managed around the southeastern and eastern United States by the National Park Service.

We fully support the Eastern Carolina Foundation for Equity and Equality and the Middle Passage Marker Committee's efforts to:

- Work with individuals and organizations to create and place this marker.
- Secure donations from individuals, businesses, and other organizations.
- Plan inter-city linkages for an African American heritage trail.
- Promote the importance of volunteers and community support.
- Generate community interest in this project.
- Promote cooperation among agencies, organizations, and jurisdictions.
- Find opportunities for education about African and African American culture,

heritage, and the importance of preserving these sites.

We believe this marker and its significance will heighten awareness and offer memorial to an important aspect of local history that is often overlooked. We also look forward to working with the Eastern Carolina Foundation for Equity and Equality to develop an African American Heritage driving/boating tour in Eastern North Carolina. I strongly suspect that one location in the Seashore, Portsmouth, could figure prominently in this effort.

Thank you for considering the placement of the Middle Passage Marker. We look forward to attending the dedication of this historic place in a ceremony later this year.

Sincerely,

Jeff West
Superintendent
Cape Lookout National Seashore

United States Department of the Interior

NATIONAL PARK SERVICE
Cape Lookout National Seashore
131 Charles Street
Harkers Island, North Carolina 28531

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June 15, 2021

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Sincerely,

Jeff West
Superintendent
Cape Lookout National Seashore

United States Department of the Interior

NATIONAL PARK SERVICE
Cape Lookout National Seashore
131 Charles Street
Harkers Island, North Carolina 28531

IN REPLY REFER TO:

June 15, 2021

Dear Beaufort Parks and Recreation Advisory Board,

On behalf of the National Park Service (NPS), I would like to express our support for the Eastern Carolina Foundation for Equity and Equality and the Middle Passage Marker Committee's efforts to place a marker and dedicate Topsail Park, in Beaufort, North Carolina, as a documented Middle Passage arrival site and an African American Heritage Site.

From as far north as Portsmouth (NH), down the eastern seaboard including New York (NY), Yorktown (VA), and Sullivan's Island (SC), westward through New Orleans (LA), over to Galveston (TX), and many places in-between, permanent Middle Passage Markers have been placed at, or near their documented arrival sites to create an inclusive space for education, reflection, and awareness. The town of Beaufort is one of approximately 48 documented ports of the slave trade that was part of the Middle Passage route.

In alignment with the Department of the Interior Secretary's goals, the National Park Service supports efforts that addresses racial inequality or honors their historic occurrence. The proposition of this marker and the proposed location appears to be close to the exact site of arrival based on historic record. The Topsail Park location incorporates many important features of an arrival site, not only for UNESCO's Slave Route Project, but for a potentially significant point for an African American heritage trail, like those preserved and managed around the southeastern and eastern United States by the National Park Service.

We fully support the Eastern Carolina Foundation for Equity and Equality and the Middle Passage Marker Committee's efforts to:

- Work with individuals and organizations to create and place this marker.
- Secure donations from individuals, businesses, and other organizations.
- Plan inter-city linkages for an African American heritage trail.
- Promote the importance of volunteers and community support.
- Generate community interest in this project.
- Promote cooperation among agencies, organizations, and jurisdictions.
- Find opportunities for education about African and African American culture,

heritage, and the importance of preserving these sites.

We believe this marker and its significance will heighten awareness and offer memorial to an important aspect of local history that is often overlooked. We also look forward to working with the Eastern Carolina Foundation for Equity and Equality to develop an African American Heritage driving/boating tour in Eastern North Carolina. I strongly suspect that one location in the Seashore, Portsmouth, could figure prominently in this effort.

Thank you for considering the placement of the Middle Passage Marker. We look forward to attending the dedication of this historic place in a ceremony later this year.

Sincerely,

Jeff West
Superintendent
Cape Lookout National Seashore

United States Department of the Interior

NATIONAL PARK SERVICE
Cape Lookout National Seashore
131 Charles Street
Harkers Island, North Carolina 28531

IN REPLY REFER TO:

June 15, 2021

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Thank you for considering the placement of the Middle Passage Marker. We look forward to attending the dedication of this historic place in a ceremony later this year.

Sincerely,

Jeff West
Superintendent
Cape Lookout National Seashore

The North Carolina African American Heritage Commission

June 11, 2021

Heather Walker
Director of Operations
Eastern Carolina Foundation
For Equity and Equality
1013 Cedar Street
Beaufort, North Carolina 28516

Dear Ms. Walker,

I am writing in support of the Middle Passage Project Committee and the Eastern Carolina Foundation for Equity and Equality's request to dedicate Topsail Park and erect a Middle Passage marker in Beaufort, North Carolina. As a supporter and advisor of their work to erect a permanent marker honoring those who died and those who survived, I am hopeful that this proposal will see the realization of their goal. This effort will serve as an important and significant reminder of this rich, though painful history, particularly for descendants who reside in our state.

As a division of the North Carolina Department of Natural and Cultural Resources, we at the North Carolina African American Heritage Commission works with a mission to preserve, protect, and promote North Carolina's African American history, arts, and culture for all people. As part of our Africa to Carolina initiative, it is our great hope that disembarkation sites where enslaved Africans disembarked directly from the African Continent all along the coast of North Carolina are identified, acknowledged, and marked. Beaufort has been identified as one of five such towns in North Carolina including Wilmington, New Bern, Bath, and Edenton. The town of Beaufort would be the first community in the state to move forward and physically mark one of these sites. In addition to the Commission, this work is supported by the nationally significant Middle Passage Ceremonies and Port Markers Project, as well as the United Nations' Education, Science, and Culture Organization's (UNESCO) designation of this site as a Site and Itinerary of Memory by their Slave Route Project.

I fully support this continuing effort to erect a Middle Passage marker in Beaufort, North Carolina. Thank you for your consideration of this worthy proposal.

Sincerely,

Adrienne Nirdé
Associate Director
919-295-6129
Adrienne.nirde@ncdcr.gov

Middle Passage Ceremonies & Port Markers Project, Inc.

Remembering Ancestors

May 1, 2019

Dr. Ali Moussa-Iye, Chief
History and Memory for Dialogue Section
Social and Human Sciences Sector
SHS/HMD Office 2.120
United Nations Educational, Scientific and Cultural Organization
7, Place Fontenoy
75007 Paris, France

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Bernice Johnson Reagon
Gladys M. Reed
Benetta Standly
Corey Walker

Dear Dr. Ali Moussa-Iye

This package, sponsored by the **Middle Passage Ceremonies and Port Markers Project**, is our final submission of individual requests for association with the UNESCO Slave Route Project as a Site of Memory. There are eleven documented U.S. Middle Passage arrival locations that are included. Each has been verified as an arrival site through the *Voyages: Transatlantic Slave Trade Database* and/or separate research sources identified in this enclosure.

Significantly, if approved, 42 of the 52 documented U.S. Middle Passage arrival locations will be Sites of Memory associated with the UNESCO Slave Route Project. This designation enables a broader connection of local events to national and international history. Presently, as a result of this association, there are activities and events that have been planned and coordinated in this country during 2019 that are unprecedented.

We hope and anticipate that these eleven requests will receive UNESCO approval by August 2019 in order to take advantage of the commemoration of the Slave Route Project's 25th anniversary planned in Benin, the half-way point in the International Decade for People of African Descent, and the 1619-2019 U.S. national remembrance at Point Comfort, VA.

It has been an honor and privilege to work with you and your staff to formally and publicly incorporate these local places into global history. In 2019, the following locations will include on their public markers the UNESCO Slave Route Project text and logo: Mobile, Alabama - June 19; Middletown, Connecticut - September 28; Algiers/New Orleans, Louisiana - Autumn; Africatown/Plateau, Alabama - December 2

Locations included in this submission:

1. Annapolis, Maryland
2. Baltimore, Maryland
3. Biloxi, Mississippi
4. Bath, North Carolina

5. Beaufort, North Carolina
6. Edenton/Roanoke, North Carolina
7. New Bern, North Carolina
8. Bristol, Rhode Island
9. Newport, Rhode Island
10. Richmond, Virginia
11. West Point, Virginia

Sincerely,

Ann Chinn

Ann Chinn
Executive Director

North Carolina Office of Archives & History

Department of Cultural Resources

The Colonial Records Project

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North Carolina Historical Review

Slavery and Servitude

The Seaborne Slave Trade of North Carolina

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Whereas the slave trade of most of the North American colonies has been investigated, that of North Carolina has been largely neglected because of the dearth of evidence.[1] John Spencer Bassett, the state's first historian of slavery, wrote that "the story of the negro in the colony of North Carolina must be reconstructed out of very unsatisfactory materials," while documentary historian Elizabeth Donnan, who also commented on the paucity of records, did not find enough material to enable her to devote a section to the colony as was her custom in her volumes on the history of the slave trade.[2] Of the more recent general histories of the Atlantic slave trade, only James Rawley paid any attention to the slave trade of North Carolina; Philip Curtin made only a passing reference; and Roger Anstey ignored North Carolina.[3] Even in studies devoted specifically to North Carolina, the importation of slaves by sea has received cursory treatment. In his discussion of the import trade of North Carolina, 1763-1775, Christopher Crittenden merely stated that "a few Negro slaves came from the British West Indies," while Harry Roy Merrens wrote that "very few Negroes were actually imported into the colony during the eighteenth century."[4]

Though perhaps exaggerated, the obstacles to the development of a seaborne slave trade with North Carolina are familiar.[5] Like other branches of seaborne commerce, the maritime slave trade suffered because of North Carolina's notoriously hostile coast. Shallow sounds and rivers further restricted the draft of vessels and impeded communications inland. As a result, North Carolina ports proved inadequate centers of trade. The comparatively sparse population of the coastal areas also provided only limited markets for imports. North Carolina had no Charleston, Philadelphia, or New York. Until the modest trade in rice and indigo developed to supplement the export of naval stores and animal skins, North Carolina ports furnished few commodities for return cargoes.

This article is an attempt to reconstruct the number of slave importations by sea before the state of North Carolina began restricting the trade in the mid-1790s. To overcome the paucity of materials on North Carolina's slave trade, a number of sources have been consulted. Few North Carolina newspapers survive before the last years of the eighteenth century, and those that do provide only sketchy information on the slave trade.[6] Similarly, although the colonial assembly established "ports" or customs districts before the Revolution, few records of the earlier years exist. Currituck, with no fixed collecting point, and Roanoke, with a collector of customs established eventually at Edenton, were the oldest ports. Bath became a port in 1716, and the assembly created Port Beaufort, with two centers at Beaufort and New Bern, in 1722.[7] Finally, Brunswick became a customs district in 1731, with ports at Brunswick and later Wilmington. Registers for two ports, Brunswick and Roanoke, survive for some years in the late colonial period, and registers for all five ports, as well as some duty books that include imports of Negroes from 1787, exist for the late 1780s.[8] For the years 1768 to 1772 summary figures for all the North Carolina ports appear in the returns of the Board of Customs and Excise, America.[9]

To supplement the North Carolina records, this study has made use of the naval office shipping lists for other colonial ports, both on the American mainland and in the West Indies.[10] As a scrutiny of tables 1, 2, and 6 reveals, there are considerable gaps in those records. Information is particularly scarce before 1752. (For details, see appendix 5.) It should be noted, moreover, that the data given in the detailed listing in appendix 1 signify clearances from American and West Indian ports and not arrivals in North Carolina, though there is no reason to suppose that the records are incomplete or that slaves failed to arrive at their intended destinations. While the surviving lists provide information about the transport of Negroes to North Carolina, it should not be concluded that where returns are not available, trade in slaves did not take place. A further defect of the extant records is that no information relating to exports from West Africa exists so that evidence of that branch of the trade can be derived only from records relating to North Carolina. Despite those limitations, the details printed here increase substantially previously available figures of slaves imported into North Carolina. Finally, some additional information about the trade has been derived from mercantile correspondence and other miscellaneous records.[11]

The political history of North Carolina further complicates any discussion of the slave trade. After the Lords Proprietors received a grant for Carolina from Charles II in 1663, the southern part of the province grew much more rapidly than the northern part. By 1708 one-half of the population of South Carolina was black as slaves poured into the port of Charleston.[12] Although the two parts of the province always had separate governments, it was not until the appointment of Edward Hyde as governor of North Carolina in 1711 that the division of the colony into two separate spheres became more formalized. In 1719 the people of South Carolina seized the government of that colony and urged the Crown to assume jurisdiction. The arrival of Robert Johnson in 1730 as royal governor restored stability to South Carolina's government. Meanwhile, seven of the eight Lords Proprietors sold their shares of what remained of the colony to the Crown in 1729, and North Carolina too became a royal colony. Consequently, the distinction between North Carolina and South Carolina was not always stated in the records of the early decades of the eighteenth century. But references to "Carolina" usually meant South Carolina.[13]

For North Carolina, like other American mainland colonies, Negroes could be obtained by sea from three sources: Africa, the West Indies, and other mainland colonies. The story of the seaborne slave trade to North Carolina falls into three periods: first, the years to 1748, when a small number of blacks were brought in for domestic purposes; second, the period from 1749 to the American Revolution, when a growing number of slaves were

imported, particularly to cultivate rice in the moist lowlands of North Carolina from the lower Cape Fear River south; then, after the Revolution interrupted imports, the final years of the trade until 1790, when slaves were brought in for plantation cultivation.

The earliest importation of slaves into North Carolina by sea is not known for certain. Writing from Bermuda in 1708, Lieutenant Governor Benjamin Bennett reported that about twenty-five years previously—sometime in the mid-1680s—a vessel had delivered about ninety slaves from Calabar on the west coast of Africa to North Carolina and Virginia. How many were landed in North Carolina is not known.[14] Similarly, as early as 1670 settlers in the Albemarle region began claiming headrights for Negroes they brought into the colony. It is not clear, however, whether the slaves arrived by sea or overland.[15] The first definitive references concern a Negro woman brought from Virginia to Port Roanoke on June 6, 1702, in the North Carolina sloop *Ann* and one Negro carried from Patuxent, Maryland, to Port Roanoke in the *Speedwell* in 1704.[16] Thereafter the available official records are silent for twenty years.

Surviving merchants' papers suggest, however, that blacks were conveyed to North Carolina by sea in some of those years. The letter book of Thomas Pollock, a prominent planter and politician, shows that he sought to obtain slaves from merchants in Boston in 1711, 1714, 1716, 1717, and 1718.[17] As table 1 indicates, the naval office shipping lists for the years between 1723 and 1746 provide evidence of the export of slaves to North Carolina for most years (with the exception of 1731, 1736, 1742-1743, and 1745). Before 1746, apart from one vessel in 1738 that cleared for Cape Fear, all the vessels were bound not for a specific destination but more generally for North Carolina.

TABLE 1

Virtually all the slaves came from other mainland colonies. The great majority came from the neighboring colony of South Carolina (224 out of 315), but 29 came from New York and 24 from Virginia.[18] There were three small consignments from New Jersey, two from Jamaica, and one from the Bahamas. Whether any came from other West Indian islands is not known. Further, as Governor George Burrington complained in 1733, no Negroes were brought "directly from Affrica" to North Carolina.[19]

During the 1740s the slave trade to both the Carolinas came to a virtual halt. Tensions among Britain, France, and Spain increased during the decade as war spread from Europe to colonial possessions in the New World. Spanish privateers raided the coast, preying on colonial shipping and attacking at various times Ocracoke, Beaufort, and Brunswick. Meanwhile, Spanish-held St. Augustine, Florida, became a refuge for runaway slaves. The Spanish monarch offered freedom to any slaves who deserted the British colonies, and the Spanish governor at St. Augustine refused to allow Carolina slaveholders to recover fugitive slaves. The chief reason for the hiatus in the slave trade, however, may have been the Stono Rebellion in South Carolina. In 1739 a band of slave insurgents gathered along the Stono River within twenty miles of Charleston and began a murderous rampage. At least twenty whites died before the insurrection was quashed. Frightened by the signs of slave rebelliousness all around, both South Carolina and North Carolina passed stringent new laws governing slaves in 1740 and 1741 respectively. In South Carolina a prohibitive duty was placed on new slaves arriving from Africa and the West Indies. During the 1740s slave importations to South Carolina dropped to one-tenth the level at which they had been the previous decade.[20] Only two consignments of slaves were shipped from Jamaica to North Carolina, in 1744 (four Negroes) and 1746 (twenty-five Negroes). Between September 29, 1744, and March 25, 1745, an unknown number of Negroes were brought up the coast from Charleston.[21]

As the disorders of the 1740s subsided, however, the importation of slaves into North Carolina resumed. With the exception of four years—1750, 1751, 1760, and 1761—the

annual figures for 1749 to 1767 are set out in table 2. Except for a period of conflict (1757-1761) occasioned by the French and Indian War, the volume of the slave trade rose markedly. Moreover, between 1749 and 1756 and between 1763 and 1775, according to the available records, slave imports came mainly from the West Indies rather than from the mainland colonies. Between 1749 and 1756, ninety-nine came from Jamaica, twenty-six from Barbados, and two from the Bahamas. In addition, slaves arrived from Boston in 1753 and, according to the South Carolina duty books, from Charleston, 1751-1754. The Seven Years' War, as it was known in Europe, appears to have cut off imports from the West Indies, and so between 1757 and 1762 (there were no imports in 1760 and 1761) imports came from other mainland ports—New Hampshire, Boston, and Charleston. The one exception to that pattern—and it was an enormous one—revealed the importation of 258 Negroes directly from Africa in 1759.[22] Then in the late 1760s commerce with the West Indies revived, while coastal trade with Charleston continued.[23]

TABLE 2

In the years immediately preceding the Revolution, the importation of slaves remained strong. As table 3 for 1768-1772 (based on information from Board of Customs and Excise returns) shows, some 79 percent of imported slaves came from the West Indies, 15 percent from other mainland colonies, and a small number in 1769 and 1771 from Africa. Further information about a few of those imports in 1768 and 1769 can be seen in appendix 1.

The Board of Customs and Excise returns also provide figures on the importation of slaves into North Carolina by customs districts for 1768-1772 (see table 4). No Negroes were brought to Port Currituck, and only two were carried from the West Indies to Port Bath. The slave trade of the other three ports—Brunswick, Beaufort, and Roanoke—was fairly evenly distributed, with more slaves arriving coastwise in Port Brunswick, probably because it was nearer Charleston than the other two ports.[24] In 1772 royal governor Josiah Martin stated in a letter to Lord Hillsborough, secretary of state for the colonies, that although he could not report "with precision the number of Negroes that have been imported since my arrival here [in 1771]," he estimated the figure at two hundred.[25] That appears to have been uncannily accurate.

The Board of Customs and Excise returns also reveal the relative position of the North Carolina slave trade within the total trade in Negroes of the mainland colonies. Of the major slave importing colonies, as table 5 shows, North Carolina was the least important.

TABLE 3

For the 1770s two shipping registers survive for Brunswick (1773-1775) and Roanoke (1771-1775) that, like the naval office shipping lists, contain detailed information for individual vessels, as set out in appendix 2. Between 1771 and 1775 a total of 203 Negroes arrived in Edenton in eighteen vessels, all from the West Indies with Antigua and Jamaica being the main sources. More than 302 Negroes were imported through Port Brunswick.[26] Most of them came from the West Indies, some from Charleston (13 percent), and for some the origin has been obliterated from the records. Of the eighteen vessels that came from the West Indies, eight carried slaves from Jamaica, five from Grenada, and one each from Barbados, Dominica, St. Croix, St. Eustatius, and Tobago. For the other three North Carolina ports, virtually no information is available, save that at New Bern some slaves arrived from Jamaica in 1772 aboard the *George,* owned by Rhode Island merchant Aaron Lopez.[27] Moreover, "a Parcel of likely healthy slaves" from Africa arrived in New Bern on the schooner *Hope* in 1774.[28] The latter shipment

may have reflected an emerging interest in trade with Africa.[29] Taken together, the extant registers plus a few other records show that imports of slaves into North Carolina were at least 112 in 1772 and exceeded 117 in 1773 and 258 in 1774, with smaller imports in 1771 and 1775 (see table 6). The small size of consignments of slaves shipped from the islands of the West Indies suggests that they were sent as partial payment for the cargoes of lumber, provisions, and livestock carried thence. The exports from North Carolina rather than the demand for slaves provided the impetus for that trade.

How accurate were the returns? For much of the period between 1748 and 1775 only the clearances to North Carolina from ports elsewhere exist. Nonetheless, for two vessels trading in the 1770s, returns are available for both their clearances from the West Indies and entrances into North Carolina ports. On April 21, 1772, the forty-five-ton sloop *Nancy,* master Alexander Valentine, cleared Antigua with twelve seasoned Negroes; it arrived in Roanoke on May 1 with twelve Negroes. The only difference between the two statements is that the sloop cleared with a crew of six and arrived with five, which may well have been true. The forty-ton sloop *Francis,* master James Robinson, sailed from Bridgetown, Barbados, on November 10, 1774, with ten new Negroes and arrived in Roanoke on December 15 with the same cargo. Again the only difference between the two records relates to the number of crew. In the case of the *Francis,* the sloop left Barbados with a crew of six but arrived at Roanoke with a crew of seven. Records for particular vessels appear likely to be correct.

TABLE 4

TABLE 5

For 1771 and 1772 a comparison can be made between the extant shipping registers for the port of Roanoke and the summary figures given in the return of the Board of Customs and Excise.[30] Such a comparison reveals that for 1772 the 106 slaves listed in the customs return as having entered at Roanoke agrees with the total number of entries (106) derived from the port register (see table 6). For 1771 the detailed port entries total thirty Negroes, whereas the Board of Customs return gives thirty-one (see table 6).

Other comparisons are relevant. According to a report by royal governor Arthur Dobbs on February 8, 1755, an annual average of 17 slaves had entered through Port Beaufort or New Bern in the previous seven years (between January 5, 1748, and January 5, 1755), whereas 19 slaves had arrived at Port Bath in the previous year.[31] The figures obtained from the surviving naval office shipping lists reveal an average of 9.4 Negroes imported annually from 1748 to 1754. However, they also show that at least 36 were imported from Jamaica in 1754 (see table 2). In 1764 the *North Carolina Magazine* (September 28-October 5, 1764) of New Bern reported that 179 slaves had been imported through Port Beaufort between October 1, 1763, and October 1, 1764. That statement compares with a figure of about 41 for which definite shipping records exist (it is not possible to be precise because the dates indicate departures from the originating port rather than arrivals in North Carolina). Finally, the totals of the separate returns from the naval office shipping lists and the colonial shipping registers mostly fall short of the consolidated returns from the Board of Customs and Excise, sometimes by wide margins: in 1768, 34 compared with 198;[32] in 1769, 13 compared with 169; in 1770, none compared with 115; in 1771, 68 compared with 82; and in 1772, 112 compared with 155.

Earlier historians have argued that customs officials did not record every vessel that carried slaves. John Spencer Bassett wrote: "it is likely that an additional number [of slaves] were brought in without paying duty." But no duty was required. Bassett went on: "the custom houses were very loosely kept." That theme was taken up by Marvin L. Michael Kay and Lorin Lee Cary, who, after studying newspaper notices of imported

slaves, posited “lax record-keeping practices by officials at North Carolina ports of entry.”[33] Christopher Crittenden took another point of view. He noted that Governors George Burrington and Arthur Dobbs often urged the establishment of a port of entry at Ocracoke and the abolition of the ports of New Bern (Beaufort), Bath, and Edenton (Roanoke) so as to ease record keeping. But the change was never made. Crittenden concluded that “this was probably due mainly to the fact that, even with the customs officers located where they were, illegal trade diminished almost to the vanishing point.” An alteration of the existing customs houses became unnecessary. Governor Dobbs believed that there was less illicit trade in North Carolina than in any other continental colony, while Governor William Tryon insisted that few violations of commercial regulations occurred in the province.[34] The real problem in assessing the seaborne trade of North Carolina results from missing records. Where they exist, they provide a reasonably accurate account; unfortunately, too many records have been lost.

Historians also disagree about the impact of imported slaves on the colony’s black population. Harry Roy Merrens asserted that “during the third quarter of the eighteenth century, the Negro population of North Carolina...must have increased almost entirely as a result of natural increase, since very few Negroes were actually imported into the colony during the eighteenth century.” He further noted that “on the basis of a few scattered references to the numbers of Negroes that were imported into the colony, it would be reasonable to assume that even in the busiest years no more than one or two hundred [slaves] were imported.”[35] In contrast Kay and Cary argued: “There appears to be little doubt, therefore, that the large increase in the number of slaves in North Carolina during the second third of the eighteenth century can be explained in part by immigration to the colony. Indeed, probably more than half the increase in black population for the years 1755 to 1767 [the years for which taxable returns are available] can be so explained.”[36] But Kay and Cary may well have exaggerated the volume of imports in two ways. First, they imply that they can extrapolate on the basis of two months’ newspaper advertisements for imported slaves to obtain a figure for the year. Though there was no marked periodicity to the trade, such a procedure may well inflate the volume of imports. Secondly, their procedure does not take into account the possible effect of the Seven Years’ War. Affected by the absence of returns for Jamaica, as table 2 suggests, apparently few imports occurred in 1757 and 1758 and no imports in 1760 and 1761. The high figure for 1759 has been influenced by a probably exceptional cargo from Africa. Thus, the effect of slave imports by sea on population growth in North Carolina must have been limited and largely concentrated in two areas—north of Albemarle Sound and the lower Cape Fear region.[37]

North Carolina was not insulated from political developments. During the Stamp Act controversy, 1765-1766, the colonists forced the resignation of several officials, including the comptroller of Port Brunswick, which was closed for several months. That action may have affected the trade in slaves. But the agreement of North Carolinians, like other colonists, to boycott slave imports starting November 1, 1765, seems to have had little effect on the trade in slaves (see table 2). By the end of April 1766 Governor Tryon could declare that the Cape Fear was again open to shipping.[38] In the fall of 1769 an extralegal meeting of the colonial assembly adopted a “nonimportation association,” but its impact was negligible. Merchants no doubt continued their usual trade.[39] In February 1771 Governor Tryon reported that “notwithstanding the boasted associations of people who never were in trade, and the sham patriotism of a few merchants to the southward of the province, the several ports of this province have been open ever since the repeal of the Stamp Act for every kind of British manufactures to the full extent of the credit of the country.”[40]

By the summer of 1774 discussion of nonimportation had renewed. Whereas the planters had supported the nonimportation movement in 1769 and the merchants had not, in 1774 nonimportation gained wider support. On August 8, 1774, the freeholders of Rowan County resolved "That the African Trade is injurious to this Colony, obstructs the Population of it by freemen, prevents manufacturers, and other Useful Emigrants from Europe from settling among us, and occasions an annual increase of the Balance of Trade against the Colonies." Accordingly, the First Provincial Congress resolved three weeks later "that we will not import any slave or slaves, nor purchase any slave or slaves imported or brought into this province by others from any part of the world after the first day of November next."[41]

Enforcement of the resolution proved to be politically delicate. On December 14, 1774, Harold Blackmore reported to the Wilmington Safety Committee that since December 1 he had imported five Negro slaves aboard the sloop *Mary* and an unnamed brig.[42] On December 17 the Safety Committee considered the case of Arthur Mabson, who had "imported in his schooner from the West Indies some slaves which were now at his plantation near Wilmington." Similarly, George and Thomas Hooper and Peter Mallet also stated on January 21, 1775, that they had imported "sundry negroes" since December 1, 1774. The Safety Committee ordered the reshipment of all those slaves at "the first opportunity."[43]

Despite that action, the importation of slaves still did not cease completely. On January 13, 1775, for example, an advertisement in the *North-Carolina Gazette* (New Bern) announced that late the previous year the schooner *Hope* had arrived from Africa with a number of healthy slaves "consisting of Men, Women, and Children."[44] On March 6, 1775, Cornelius Harnett, a leading revolutionary in Wilmington and the colony, was allowed to retain a Negro that he had imported from Rhode Island in October 1774, but Captain John Oldfield, who also reported in March that two Negroes had been shipped to his address, was required to reship them and did so. Later that spring the Safety Committee at first refused a Mr. Elliott permission to import house servants from Jamaica but then rescinded the resolution. A similar application from a Mr. Elliston was rejected.[45]

The political and military tumult of the revolutionary war effectively ended the slave trade to North Carolina, except for two unusual cases. In the first instance the privateer *Fortunate* captured a vessel with thirty-six slaves and sold them at Brunswick in 1780. In the second instance, reported in January 1781, several Rhode Island mariners made a dramatic escape from a prison ship in Charleston harbor by seizing a schooner "with sundry negroes on board" and sailing it to Wilmington. There "they sold the negroes, and with the money purchased a cargo of naval stores, with which they arrived safe at Newport."[46] Clearly, those episodes represented isolated opportunities to turn the war's misfortunes into accidental profits and not purposeful trading in slaves. Thus, those two shipments are not included in the appendixes.

But the state did not escape entirely unscathed from the war. In 1776 Brunswick was sacked by the British and thus its existence as a port and settlement came to an end. No attempt was made to reinstate it, and the ruins can still be seen. From that time on Wilmington served as the port for the Cape Fear region.

Unlike most of the new American states that outlawed the slave trade in Negroes after the Revolution,[47] the import of slaves by sea was resumed in North Carolina, as the shipping registers that survive for all five customs ports for most of the 1780s reveal. The details of imports are set out in table 7, which shows that Wilmington in the customs port of Brunswick was the most active port, frequented by 56.5 percent of the vessels involved. Sizable numbers of Negroes were also brought into New Bern (Beaufort) and Edenton (Roanoke)—in the latter 297 out of 323 in four consignments—but only a

handful arrived in Bath and Currituck.

TABLE 6

TABLE 7

As table 8 shows, a total of 993 blacks are known to have been brought to North Carolina between 1784 and 1790.[48] The largest single source of supply was Charleston, from whence came 261 slaves (26.3 percent); 212 (21.3 percent) came from the West Indies, mainly from Jamaica; three large consignments totaling 231 (23.3 percent) came from Africa;[49] and 273 (27.5 percent) came from other mainland states—153 from Maryland, 44 from Georgia, and the remainder from other states on the eastern seaboard. Surprisingly, only 20 came from Virginia by sea. Eight came from Nova Scotia and within North Carolina, 7 Negroes were transferred from Wilmington to Beaufort by sea in 1786, and 1 came from Swansboro to New Bern in 1789.

An exceptional import of slaves took place in the mid-1780s as the result of the formation of the Lake Company, which intended to dig a canal from what is now Lake Phelps to the Scuppernong River.[50] One of the three partners, Josiah Collins, went to Boston "in the latter part of 1784 or early 1785" to fit out a ship for the purpose of bringing slaves from Africa to dig the canal. In the Roanoke register for 1786 appears an entry on June 10 for the brig *Camden,* master Richard Grinald, with eighty Negroes from Africa. The vessel appears to have made a second voyage to Africa, for in a waste book of the Lake Company an entry headed Edenton, March 12, 1787, records the payment of seven thousand pounds for seventy slaves imported from Africa.[51] On September 11, 1786, sixty-six American slaves were brought into Roanoke from Charleston on the sloop *Polly,* Thomas Newbold master, and on June 1, 1787, eighty-one Negroes from Africa were entered into Roanoke on the *Jennett,* James Brattell master. It is possible that those Negroes were also destined for the Lake Company since they were unusually large consignments. The slaves were set to work on the canal, which was completed in 1788. Finished to a width of twenty feet and a depth ranging between four and six feet, it was dug on a straight course of six miles linking the lake with the river. In the 1790 census 113 Negroes are listed for the Lake Company.

With the support of interests in the western part of the state, the General Assembly of 1786 passed an act imposing a duty on "all Slaves Brought Into This State by Land or Water." The lawmakers termed "the importation of slaves into this State" as "productive of evil consequences, and highly impolitic."[52] A tax of five pounds each was to be levied upon slaves between the ages of seven and twelve, and thirty and forty; of ten pounds on those between the ages of twelve and thirty; and of fifty shillings on those under seven and over forty. The law assessed a head tax of five pounds on all slaves brought directly from the coast of Africa. Opposed by the merchants, the act did not prove to be prohibitive, and slaves continued to be brought—though in declining numbers—into the state. The General Assembly repealed the act in 1790.[53]

TABLE 8

Prompted no doubt by fear of slave revolts following the insurrection in Saint-Domingue in 1791, the General Assembly made the importation of slaves "by land or water" liable to a fine of one hundred pounds in 1794. An exception was made for any slaveholder who took an oath that he was importing slaves only for his "own service." The law, meant to end the "sale or traffic" in slaves, was defective in that no particular officer was authorized to prosecute those who violated the act. In 1795 the General Assembly felt compelled to pass another law prohibiting the importation of slaves from the West

Indies —or the French, Dutch or Spanish settlements on the southern coast of America.—[54] Thus, even before the federal Constitution ended the slave trade in 1808, North Carolina had taken steps to halt the commerce in African slaves.

Although the preponderance of blacks involved in the North Carolina slave trade were imported, occasionally they were exported to other mainland colonies and the West Indies. Scattered information is available for 1718, 1729, 1736, 1750, 1752, 1756, and 1764.[55] In those years eighteen slaves are known to have been exported, of whom eleven were dispatched to Charleston. As the return of the Board of Customs and Excise reveals, the trade was more active between 1768 and 1772 (see table 9). Thirteen Negroes were carried coastwise from Beaufort in 1768, five in 1770, and five in 1772. The exports to the West Indies all originated from Roanoke.

During the Revolution in September 1782, Mathew Emanuel of Havana asked North Carolina merchants John Gray Blount and William Blount to purchase "six good stout Black Men slaves & two Black Women," but it is not known whether that transaction took place. A further attempt to develop trade with Cuba occurred in 1793, when John Gray Blount received a letter from Beloix Freres and Company of Havana stating that the "Trade of Negroes is at present very Lucrative here." The Blounts did not make slave trading a business in itself. They bought and sold for their personal needs or when it was incidental to some other commercial transaction.[56]

After the Revolution a small number of slaves were exported each year between 1785 and 1789. Altogether three were exported from Beaufort in 1785 and 1786, fifty-one from Wilmington between 1787 and 1789, and eleven from Currituck in 1789. Of those, twenty-one went to the West Indies, principally New Providence in the Bahamas, the destination of one is unknown, and the remainder went to other southern states—eighteen to Savannah and twenty-five to Charleston.[57] Most of the vessels involved in exporting slaves were American owned. The largest ship sailed out of Glasgow, Scotland. Evidently the only North Carolina vessel engaged in the trade was the schooner *William.* Owned by Luke Swain of Charleston, it was registered in Wilmington in 1787.

To discuss the shipping that brought slaves to North Carolina is not to analyze the components of a slave fleet but rather to examine the composition, by and large, of two regional fleets. The slave trade with North Carolina was not a triangular trade. The traffic was mainly bilateral—those vessels that plied the coastal waters of the eastern seaboard of North America and those that traded between the West Indies and the mainland British American colonies. A motley group of vessels, they were employed in the transport of a mixed cargo. In nearly all cases the commerce in Negroes was incidental to the vessels' activities and not a regular trade. Thus, of the forty-two voyages for which records exist between 1723 and 1746, twenty-six vessels carried Negroes only once while five vessels carried Negroes on more than one occasion.[58] Similarly, most of the seventy-four vessels that transported Negroes between 1749 and 1769 did so only one time. The exceptions were the brig *Wilmington* (fifty tons) of Brunswick, which carried slaves on seven occasions, the sloop *Nancy* (fifty tons) also of Brunswick, which brought slaves from Jamaica on five occasions, and six other vessels that each bore slaves on two voyages during that period.[59] In the early 1770s only four vessels—one carrying Negroes on three occasions and the other three carrying Negroes twice each—out of a total of forty-three made more than one voyage.[60] Finally, of the ninety-three vessels that conveyed blacks to North Carolina between 1784 and 1790, fourteen made more than one voyage.[61]

Before 1746 New England sloops predominated among the vessels that brought slaves to North Carolina. Only 1 of the 31 vessels evidently was built in North Carolina, the

sloop *Thomas & Tryal* (twenty tons), constructed in 1738.[62] Among the other vessels 1 was built in the West Indies and 3 in Britain; 1 vessel was a French prize. Between 1749 and 1775, 19 of the 117 vessels that transported slaves to North Carolina had been built there. Most of them had been laid down since 1760, by which time schooners as a type of vessel built in North Carolina had begun to outnumber sloops.[63] For the 1780s no similar statements can be made because information about the place of construction is not available.

TABLE 9

Taking into account the volume of the trade and the nature of the water approaches to the ports of North Carolina, most of the vessels were small. Between 1723 and 1746 the majority of the vessels (19 out of 31) were 20 tons or under. The only vessel over 35 tons was the 70-ton brig *Tryal* of Boston. Between 1749 and 1775 the size of vessels had grown appreciably. Of the 117, only 11 were 20 tons or under; the most common tonnage was 40 to 50 tons, with 38 vessels in that category. Six vessels were 100 tons or more. Finally, between 1784 and 1790, more than half of the vessels (49 of 93) were 50 tons or under. Fourteen of the vessels were 100 tons or more, with the largest vessel carrying slaves to North Carolina being 360 tons.

Only the largest vessels—ships—were British owned; in the main, vessels belonged to owners in the American mainland colonies or in the West Indies. It was unusual for an owner to possess more than one vessel, although, for example, in the third quarter of the eighteenth century Richard Quince owned six vessels, Samuel Cornell, George Blair, and Harold Blackmore owned three each, and Muscoe Livingstone owned two, while in the 1780s John Spicer owned two and James Hankinson and John Barrow jointly owned two. It was more common for masters to own vessels. Of the vessels belonging to North Carolinians, the majority were the property of Wilmington ship-owners. Most of the vessels were trading at a venture, and there were few if any constant traders. Nor were there many merchants regularly involved in the trade, which appears to have been casual rather than systematic. Luke Swain of Charleston is one of the few (being both master and shipowner) who participated more regularly. Most of the New York shippers similarly were involved in only a single voyage. Early in the century, the exceptions were Tunis Vangelder, who engaged in three voyages in 1723-1725, and John Vanpelt, senior and junior, who were involved in twelve voyages between 1725 and 1734.

The organization of the slave trade to North Carolina followed familiar patterns. Merchants from other American mainland colonies shipped slaves to North Carolina for sale. Early in the eighteenth century New England merchants played an active part in that trade.[64] Charleston merchants also transported slaves to North Carolina, particularly Brunswick. In addition, North Carolinians sought to purchase slaves. The Reverend John Urmston, an Anglican missionary, and Thomas Pollock sedulously tried to find slaves during the early eighteenth century. For example, Urmston, writing in 1716, proposed to buy "3 or 4 Negroes in Guinea" through the customs collector in Boston. Urmston desired "3 Negroes men of middle stature about 20 years old and a Girl of about 16 years."[65] Similarly, in 1715 Thomas Pollock required "hands" to work "a considerable quantity of pine land" in order to make "Tarre or pitch." He sought "young likely Sound Negroes Male or female No under 12 or 14 years of age and not above 22 or 23 years old." Pollock carefully calculated how and when he would use his slaves. He explained to Boston merchants that he preferred to import Negroes during the summer so that they could be "seasoned" and employed productively during the winter months. Generally, he emphasized the purchase of male slaves. Pollock wanted black women between the ages of thirteen and twenty to fulfill the role of "breeder."[66] Later

in the century merchants offered Negroes for sale for cash, country produce, ready money, or short credit. North Carolina newspapers regularly carried notices of slaves for sale.[67]

One method of sale in North Carolina was by auction or vendue. In 1772 Peleg Greene, master of the *George* out of Rhode Island, brought a number of slaves from the West Indies to New Bern. Greene reported that none of them fetched as much as he expected "by reason of many cuntry born Negros was sold at Vandue and at Six months Credit which makes a great ods." Even so he "sold four of them named as follows"Jack at 70 [pounds], Cudjo at 70, Homer [who had "two bad Places on one of his Thighs which wood not heal up"] at 50, Newbuary Boy at 57:10."[68] As already noted, the Roanoke customs register recorded the entry of eighty Negroes from Africa in 1786 aboard the brig *Camden.* The total cost of that special consignment for the Lake Company came to £2,844, or only around £35 per slave, but may not have reflected the level of prices on the open market. The second consignment for the company in 1787 cost £7,000, or £100 per slave.[69]

Early in the century John Brickell reported that the planters in North Carolina carefully preserved "the Gold and Silver Coin of all Nations," which circulated in the colony "to buy Negroes with in the Islands and other Places."[70] But a chronic shortage of currency, despite the issuance of paper currency in 1729, 1735, 1748, 1754, 1760, and 1761, hampered development in North Carolina and inhibited planters from buying slaves at reasonable rates.[71] To ease the situation, West Indian slave traders offered six- to nine-month credits to potential buyers.[72]

With the imposition of duties according to age in 1787, the duty registers included the ages of the Negroes imported as well as the names of owners of individual slaves who entered but were not for sale. A few Negroes, for example, had been sent to Charleston to learn trades. A note to the entry of the sloop *Charlotte* to Roanoke on June 17, 1788, stated: "4 Negroes for sale, 5 Negroes for exportation." Interestingly, a note attached to the entry of the schooner *Kitty & Comfort* into Beaufort on August 9, 1788, referred to "5 Negroes" with "sundry household furniture" who "moved with their familys to become citizens of this state." It did not indicate how many persons comprised the party.[73]

The slave trade was too small to support the existence of specialized slave merchants, so those who imported slaves into North Carolina were general merchants.[74] Among the prominent merchants at Wilmington who engaged in the slave trade in the third quarter of the eighteenth century were Frederick Gregg, John Burgwin, and Cornelius Harnett,[75] while at New Bern Samuel Cornell and Edward Batchelor were "of particular prominence."[76] Some of the importers of slaves also owned the vessels in which blacks were carried and acted as masters of those vessels. They included William Bull, Yelverton Fowkes, Daniel Robins, and Robert Spears in the 1770s and John Forster in the 1780s.[77]

The record of the number of slaves imported into North Carolina is still incomplete but, fragmentary as the information remains, it nevertheless reveals a small but steady flow of trade during the eighteenth century. Apart from the periods of war in the 1740s and 1757-1761, slaves arrived almost every year between 1720 and 1775. After the Revolution the trade revived and continued until 1790, when it appears to have ceased. Slaves were brought from both other mainland colonies and the West Indies, but few came directly from West Africa.

TABLE 10

The initiative for the dispatch of Negroes to North Carolina lay in the hands of merchants

in New England, New York, Charleston, and the West Indies, notably Barbados and Jamaica, rather than in North Carolina. Slaves came as part of mixed cargoes, which were sent to North Carolina in payment for the naval stores that found a market in the mainland colonies and the West Indies. Those imports provided a relatively minor component of the increase in the black population of North Carolina in the course of the eighteenth century.

In sum, this article offers evidence for the import of 3,236 Negroes by sea, with almost half coming from the West Indies (see table 10). In addition, imports included a number of "parcels" the sizes of which are unknown. Because of the considerable gaps in the data, table 10 presents only a minimum figure, which is nonetheless higher than that previously available; the true figure may be substantially higher. Nor does table 10 necessarily represent the relative importance of the other American mainland colonies and the West Indies as sources of slaves, though it is unlikely that the direct imports from West Africa were much higher. In that respect the experience of North Carolina in the Atlantic slave trade differs from that of the neighboring colonies. The import of slaves from West Africa was much smaller than that into South Carolina and Virginia. In consequence British merchants did not play as conspicuous a part in North Carolina's slave trade as they did in other colonies". North Carolina merchants lacked sufficient capital, suitable shipping, and appropriate expertise to engage in the direct slave trade with West Africa. Although North Carolina imported fewer slaves than other mainland colonies, future discussions of the American slave trade will need nonetheless to take into account the seaborne transport of Negroes to North Carolina.

APPENDIX 1

APPENDIX 2

APPENDIX 3

APPENDIX 4

APPENDIX 5

Footnotes

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[1] For surveys of the literature, see Paul E. Lovejoy, "The Volume of the Atlantic Slave Trade: A Synthesis," *Journal of African History* 23, no. 4 (1982): 473-501, and Paul E. Lovejoy, "The Impact of the Atlantic Slave Trade on Africa: A Review of the Literature," *Journal of African History* 30, no. 3 (1989): 365-394. For individual colonies, see Jay Coughtry, *The Notorious Triangle: Rhode Island and the African Slave Trade, 1700-1807* (Philadelphia: Temple University Press, 1981); James G. Lydon, "New York and the Slave Trade, 1700 to 1774," *William and Mary Quarterly,* 3d ser., 35 (April 1978): 375-394; Darold D. Wax, "Negro Imports into Pennsylvania, 1720-1766," *Pennsylvania History* 32 (July 1965): 254-287; Darold D. Wax, "Black Immigrants: The Slave Trade in Colonial Maryland," *Maryland Historical Magazine* 73 (Spring 1978): 30-45; Walter E. Minchinton, Celia King, and Peter Waite, eds., *Virginia Slave-Trade Statistics, 1698-1775* (Richmond: Virginia State Library, 1984); W. Robert Higgins, "The Geographical Origins of Negro Slaves in Colonial South Carolina," *South Atlantic Quarterly* 70 (Winter 1971): 34-47; and Darold D. Wax, ""New Negroes Are Always in Demand": The Slave Trade in Eighteenth-Century Georgia," *Georgia Historical Quarterly* 68 (April 1984): 193-220.

[2] John Spencer Bassett, *Slavery and Servitude in the Colony of North Carolina* (Baltimore: Johns Hopkins Press, 1896), 7; Elizabeth Donnan, ed., *Documents Illustrative of the History of the Slave Trade to America,* 4 vols. (Washington, D.C.: Carnegie Institution, 1930-1935), 4:235-239.

[3] James A. Rawley, *The Transatlantic Slave Trade* (New York: W. W. Norton, 1981), esp. pp. 408-410; Philip D. Curtin, *The Atlantic Slave Trade: A Census* (Madison: University of Wisconsin Press, 1969), 145; Roger Anstey, *The Atlantic Slave Trade and British Abolition, 1760-1810* (Atlantic Highlands, N.J.: Humanities Press, 1975).

[4] Charles Christopher Crittenden, *The Commerce of North Carolina, 1763-1789* (New

Haven: Yale University Press, 1936), 81; Harry Roy Merrens, *Colonial North Carolina in the Eighteenth Century*: *A Study in Historical Geography* (Chapel Hill: University of North Carolina Press, 1964), 79.

[5] Crittenden, *Commerce of North Carolina,* chap. 1, "Treacherous Waters."

[6] See Roger C. Jones, comp., *Guide to North Carolina Newspapers on Microfilm,* 6th ed. (Raleigh: Division of Archives and History, Department of Cultural Resources, 1984), 62-64. In addition nine previously unknown issues from the 1780s were copied for the British Records Collection, State Archives, Division of Archives and History, Raleigh.

[7] Crittenden, *Commerce of North Carolina,* 41-42. New Bern was included in the Port Bath district until about 1730.

[8] See Ports, broken series, Port Bath (1761-1794), Port Beaufort (1760-1790), Port Brunswick (1765-1790), Port Currituck (1783-1789), and Port Roanoke (1682-1806), Treasurer's and Comptroller's Papers, State Archives; Port of Roanoke Records, 1771-1776, James Iredell Papers, Southern Historical Collection, University of North Carolina Library, Chapel Hill.

[9] For a discussion of Board of Customs and Excise, America, 1768-1773 (CUST 16/1), Public Record Office, London, see James F. Shepherd and Gary M. Walton, *Shipping, Maritime Trade*, *and the Economic Development of Colonial North America* (Cambridge, England: Cambridge University Press, 1972).

[10] For a discussion of the naval office shipping lists for the West Indies, see Walter E. Minchinton, *Naval Office Shipping Lists for Jamaica, 1683-1818* (Wakefield, Yorkshire, England: Microform Academic Publishers, 1977), and Walter E. Minchinton and Peter Waite, *The Naval Office Shipping Lists for the West Indies, 1678-1825 (excluding Jamaica)* (Wakefield, Yorkshire, England: Microform Academic Publishers, 1981).

[11] The South Carolina duty books (Journals A and B, Records of the Public Treasurers, 1725-1776, South Carolina Department of Archives and History, Columbia) include references to slaves exported to (and imported from) North Carolina. The records, however, only note the duty paid, and it is not possible from that information to list accurately the number of Negroes involved nor the vessels on which they were carried.

[12] Peter H. Wood, *Black Majority: Negroes in Colonial South Carolina from 1670 through the Stono Rebellion* (New York: Alfred A. Knopf, 1974), table 1, p. 144; Jeffrey J. Crow, *The Black Experience in Revolutionary North Carolina* (Raleigh: Division of Archives and History, Department of Cultural Resources, 1977), 4.

[13] Hugh T. Lefler and Albert Ray Newsome, *North Carolina: The History of a Southern State,* 3d ed. (Chapel Hill: University of North Carolina Press, 1973), 61, 73-75. Before the Revolution, North Carolina was one of four colonies—the others being New Hampshire, Delaware, and Connecticut—that did not impose duties on the import of slaves. Rawley, *Transatlantic Slave Trade,* 316.

[14] Donnan, *Documents Illustrative of the Slave Trade* 2:48. Earlier in the same document Bennett stated that about thirty-six years previously a ship had brought approximately 125 slaves from Calabar, nearly half of whom were disposed of at Bermuda and the rest

reshipped for Carolina and Virginia, but where in Carolina is not stated.

[15] See, for example, records of 311 Negroes listed as headrights between 1670 and 1697 in the Albemarle Book of Warrants and Surveys, 1681-1706, Secretary of State Records, State Archives. Caroline Whitley and Susan Trimble have compiled a list of 651 Negro headrights from various sources between 1663 and 1744. The list is in the files of the Colonial Records Branch, Historical Publications Section, Division of Archives and History.

[16] Colonial Office (CO) 5/1441, fol. 262, Public Record Office; Certificate of Clearance, Ports, Treasurer's and Comptroller's Papers.

[17] Pollock Letter Book (1707-1761), Thomas Pollock Papers, Private Collections, State Archives. Still other references to slaves arriving in North Carolina in that period, including at least one slave shipped from Bermuda, appear in Mattie Erma Edwards Parker, William S. Price, Jr., and Robert J. Cain, eds., *The Colonial Records of North Carolina [Second Series],* 8 vols. to date (Raleigh: Division of Archives and History, Department of Cultural Resources, 1963-), 4:359, 364-365, 5:82, 6:209, 260-261, 381, 7:26, 89, 269, 482.

[18] Table 1 indicates that Negroes were shipped to North Carolina from Charleston at least as early as 1724, whereas W. Robert Higgins states that "blacks were first transshipped to North Carolina through Charleston in 1742." Higgins, "Geographical Origins of Negro Slaves," 47.

[19] William L. Saunders, ed., *The Colonial Records of North Carolina,* 10 vols. (Raleigh: State of North Carolina, 1886-1890), 3:430. Burrington added that as a result, North Carolinians had "to buy...the refuse refractory and distempered Negroes, Brought from other Governments."

[20] Wood, *Black Majority*, 308-326; Crow, *Black Experience in Revolutionary North Carolina,* 22-23; Lefler and Newsome, *North Carolina,* 166.

[21] Journals A and B, Records of the Public Treasurers, 1725-1776, South Carolina.

[22] English Manuscript 517, fol. 1, John Rylands University Library, Manchester, England.

[23] In 1765 Richard Scott of New Bern wrote to Bernard Parkinson asking him to settle various accounts for him in St. Kitts and to purchase slaves, rum, and sugar with the money collected. Barbara T. Cain, Ellen Z. McGrew, and Charles E. Morris, eds., *Guide to Private Manuscript Collections in the North Carolina State Archives,* 3d ed. (Raleigh: Division of Archives and History, Department of Cultural Resources, 1981), 245.

[24] The distance from Charleston bar to Cape Fear was sixty leagues, which was frequently run in twenty hours.

[25] Saunders, *Colonial Records* 9:279.

[26] The statement in Crittenden, *Commerce of North Carolina,* 81, that 125 Negroes were brought to Port Brunswick during the year ending April 24, 1775, appears to be incorrect.

[27] *Commerce of Rhode Island, 1726-1800,* 2 vols. (Boston: Massachusetts Historical Society, 7th ser., 9-10, 1914), 1:414. For a discussion of Lopez's role in North Carolina trade, see Virginia Bever Platt, "Tar, Staves, and New England Rum: The Trade of Aaron Lopez of Newport, Rhode Island, with Colonial North Carolina," *North Carolina Historical Review* 48 (January 1971): 1-22.

[28] *North-Carolina Gazette* (New Bern), January 13, 1775.

[29] Earlier in 1768 a twenty-five-ton sloop had entered Beaufort from Africa; in 1769 a twenty-ton sloop had cleared Beaufort for Africa and returned with thirty-six Negroes; and in 1772 two vessels, a sloop and a topsail schooner totaling 120 tons, had cleared Brunswick for Africa, and a twenty-five-ton sloop had entered there from Africa. CUST 16/1.

[30] For Maryland, Darold Wax concluded that the differences between the Board of Customs and Excise (CUST 16/1) returns and the information obtained from other sources were not serious. Wax, "Slave Trade in Colonial Maryland," 44.

[31] "An Abstract of the Shipping & Tonnage & number of negroes Enter'd in North Carolina at a medium of 7 years ending y^{e} 1 Jan^{ry} 1755," Saunders, *Colonial Records* 5:314.

[32] The consolidated figure of 198 is further corroborated by the following sources: Add. MSS 15485, fol. 25, British Library, London, which showed 28 Negroes imported into North Carolina between January 5, 1768, and January 5, 1769; and Admiralty (ADM) 7/492, Public Record Office, which for the same period reported 14 Negroes imported into Port Roanoke, 96 into Port Beaufort, and 60 into Brunswick—a total of 198. Copies of those documents are in the British Records Collection in the State Archives.

[33] Bassett, *Slavery and Servitude,* 24; Marvin L. Michael Kay and Lorin Lee Cary, "A Demographic Analysis of Colonial North Carolina with Special Emphasis upon the Slave and Black Populations," in *Black Americans in North Carolina and the South,* ed. Jeffrey J. Crow and Flora J. Hatley (Chapel Hill: University of North Carolina Press, 1984), 81.

[34] Crittenden, *Commerce of North Carolina,* 42-44.

[35] Merrens, *Colonial North Carolina,* 79, 226*n*.

[36] Kay and Cary, "Demographic Analysis of Colonial North Carolina," 81.

[37] See Merrens's map of Negro taxables in 1767, *Colonial North Carolina,* 79, which shows that Negroes made up 61 to 80 percent of the taxables in Chowan and Perquimans counties and more than 81 percent of the taxables in Brunswick County. Kay and Cary estimate the total population of North Carolina in 1767 at 165,000, of whom 41,000 were blacks. Kay and Cary, "Demographic Analysis of North Carolina," 73. The 1790 census reported a total population of 393,751 in North Carolina, including 100,572 slaves. Evarts B. Greene and Virginia D. Harrington, *American Population before the Federal Census of 1790* (New York: Columbia University Press, 1932), 160.

[38] Saunders, *Colonial Records* 7:199; Crittenden, *Commerce of North Carolina,* 117.

[39] *South Carolina Gazette* (Charleston), May 31, 1770. See Arthur M. Schlesinger, *The Colonial Merchants and the American Revolution, 1763-1776* (1918; reprint, New York: Facsimile Library, 1939), 208-209; Leila Sellers, *Charleston Business on the Eve of the American Revolution* (Chapel Hill: University of North Carolina Press, 1934), 218; and Lefler and Newsome, *North Carolina,* 199.

[40] Saunders, *Colonial Records* 8:496; Crittenden, *Commerce of North Carolina,* 117.

[41] Saunders, *Colonial Records* 9:1026, 1046.

[42] According to the Port Brunswick register, five Negroes were imported from Grenada in the sloop *Three Marys,* owned by Harold Blackmore, in 1774 (see appendix 2); Saunders, *Colonial Records* 9:1098.

[43] Saunders, *Colonial Records* 9:1099, 1113.

[44] *North-Carolina Gazette*, January 13, 1775. According to the registers for Port Brunswick and Port Roanoke, nine Negroes were imported from Charleston on March 2, two from Hispaniola on March 31, and one from Dominica on April 12, 1775. See appendix 2.

[45] Saunders, *Colonial Records* 9:1150-1151, 1171, 1222, 1266, 10:24; Donnan, *Documents Illustrative of the Slave Trade* 4:239.

[46] *Young v. Walker,* Mixed Case Files, box 43, Civil Cases, 1790-1860, United States Circuit Court, Raleigh Division, North Carolina Eastern District, Records of District Courts of the United States, Record Group 21, National Archives Atlanta Branch, East Point, Ga. (microfilm, State Archives); *Norwich* (Conn.) *Packet,* January 23, 1781.

[47] Virginia made slave importations illegal in 1778, Massachusetts and Pennsylvania in 1780, Maryland in 1783, New Jersey in 1786, and South Carolina in 1787.

[48] A member of the South Carolina Senate was reported in the *Charleston Morning Post,* March 23, 1787, as stating that ❑a vessel had recently arrived at North Carolina, with 100 slaves, who were intended to be sent here [South Carolina].❑ The final destination of that consignment has not been traced. Donnan, *Documents Illustrative of the Slave Trade* 4:492.

[49] In May or June 1787 a cargo of slaves was imported into Roanoke by Henry Hill and Thomas Fitt. Walter Clark, ed., *The State Records of North Carolina,* 16 vols. (11-26) (Raleigh: State of North Carolina, 1895-1906), 21:82. That vessel may have been the *Jennett* that entered Roanoke on June 1, 1787, with eighty-one Negroes from Africa. See appendix 3.

[50] William S. Tarlton, *Somerset Place and Its Restoration* (Raleigh: Division of State Parks, Department of Conservation and Development, 1954), 6-7.

[51] Account book of Josiah Collins, Nathaniel Allen, and Samuel Dickinson, equal copartners in sundry tracts of land in Tyrrell County, 1786-1790, Anne S. Graham

Collection (microfilm), Private Collections. Donnan notes that Josiah Collins sent a vessel to Africa for slaves in 1785 and adds "but they probably were not intended for North Carolina," which is not correct. Donnan, *Documents Illustrative of the Slave Trade* 4:240*n.*

[52] Clark, *State Records* 24:792-794.

[53] Clark, *State Records* 25:80. James Rawley's statement in *Transatlantic Slave Trade,* 410, that North Carolina prohibited the importation of slaves in 1786, reopened the trade in 1790, and brought the legal trade to an end in 1794 appears to be in error.

[54] *Laws of North Carolina, 1794,* c. 2; *N.C. Laws, 1795,* c. 444. In 1795 settlers from the West Indies, the Bahamas, or any of the French, Dutch, or Spanish plantations were forbidden to bring Negroes into the state under penalty of a one-hundred-pound fine for every imported Negro over fifteen years of age. See Donnan, *Documents Illustrative of the Slave Trade* 4:240n. In 1798 when a shipload of Saint-Domingue Negroes arrived in Charleston and was refused admittance, Governor Samuel Ashe of North Carolina "issued a proclamation in alarm calling upon the people and the officers of the State to prevent a clandestine entry at some North Carolina seaport or inlet where a landing might easily have been affected." Guion Griffis Johnson, *Ante-bellum North Carolina: A Social History* (Chapel Hill: University of North Carolina Press, 1937), 471. For the action taken by the people of Wilmington in 1803 when a vessel bearing Negroes from Guadeloupe arrived, see *Raleigh Register,* February 15, 1803.

[55] For details see appendix 4. Recalcitrant slaves were also banished. See, for example, Parker, Price, and Cain, *Colonial Records [Second Series]* 2:364, 412. In 1759 an act was passed in Virginia providing for a duty to be levied on all slaves imported into the colony from Maryland, North Carolina, or any other place in America. Effective until April 20, 1767, the act was renewed in 1766 for three years and in 1768 again for three years. Donnan, *Documents Illustrative of the Slave Trade* 4:144.

[56] Alice Barnwell Keith, William H. Masterson, and David T. Morgan, eds., *The John Gray Blount Papers,* 4 vols. (Raleigh: Division of Archives and History, Department of Cultural Resources, 1952-1982), 1:31, 2:253.

[57] Details of those exports are set out in appendix 4.

[58] The *Adventure* of New York (ten tons) made successive voyages in 1723, 1724, and 1725; the *John & Mary* of New York (ten tons) made four voyages in 1726, 1727, and 1728 (twice), and a fifteen-ton vessel of the same name carried slaves from New York to North Carolina in 1732, 1733 (twice), and 1734; the sloop *Mary* of New York (ten tons) made one voyage in 1729 and two in 1730; and the twenty-ton sloop *Thomas & Tryal* of North Carolina made two voyages, in 1739 and 1741.

[59] The schooner *Charming Peggy* (fifty tons), 1766, 1768; brigantine *Orton* (forty-five tons), 1754 twice; schooner *Polly* (seventy tons), 1764 twice; brig *Tryon* (seventy tons), 1765 twice; and sloop *Two Friends* (fifty tons), 1764 twice, all of Brunswick and coming from Jamaica; and the sloop *William* (thirty-five tons), 1754 and 1755, of Kingston, Jamaica, and coming from thence. In addition, the schooner *Sally & Betsey* and the brig *Sally & Betty* (both forty-five tons, built in North Carolina in 1763), which made voyages

from Kingston in 1765 and 1767, were probably the same vessel.

[60] The sloop *Nancy* (forty-five tons) from Antigua in 1772 (twice) and 1773 and the sloop *Francis* (forty tons) in 1773 and 1774, both to Roanoke; and the sloop *Three Marys* (forty tons) and brig *Ranger* (fifty tons) from Jamaica, both of which made two voyages to Brunswick in 1774.

[61] The schooner *Wilmington Packet* (30 tons) of Charleston made seven voyages from Charleston in 1784, 1785 (twice), 1787, and 1788 (three times); the schooner *William* (75/15 tons), also of Charleston, brought Negroes from thence on seven occasions (1786, 1787, and five voyages in 1788); the sloop *Little Peggy* (55 tons) of Jamaica brought slaves, usually from Jamaica, on five voyages (twice in 1788 and three times in 1789); and the sloop *Polly* (104 tons) of Montego Bay, Jamaica, brought Negroes from thence in 1787 and twice in 1788. The schooner *Hope* (70 tons) of Wilmington brought slaves from Jamaica in 1786 and 1787 and was then replaced by the schooner *New Hope* (130 tons), registered in Montego Bay, which carried Negroes to Brunswick in 1788 and twice in 1789. Eight other vessels made two voyages each during those years: as already mentioned, the brig *Camden* (80 tons) from Africa to Roanoke in 1786 and 1787; brigantine *Friendship* (30/60 tons) of Turtola, twice in 1785 to Brunswick, once from the Bahamas and once from New York; ship *Jane* (150 tons) of Kingston, 1786 and 1787 from the West Indies to Brunswick; sloop *Kitty & Comfort* (28 tons) in 1788 and 1789 and schooner *Quash Platter* (45 tons) twice in 1787, both from Maryland to Beaufort; the sloop *Polly* (30 tons) twice in 1787 from Indian River, Del., to Roanoke; the brig *Robert* (85 tons) twice in 1787 from Jamaica to Brunswick; and the sloop *Sally* (20 tons) in 1786 and 1787 from Delaware to Beaufort and to Currituck.

[62] Of the 229 vessels built between 1710 and 1739 that conducted trade with North Carolina, only 38 had been built there. Joseph A. Goldenberg, *Shipbuilding in Colonial America* (Charlottesville: University Press of Virginia, 1975), 52. See also Charles Christopher Crittenden, "Ships and Shipping in North Carolina, 1763-1789," *North Carolina Historical* Review 8 (January 1931): 1-13.

[63] Goldenberg, *Shipbuilding in Colonial America,* 79.

[64] See, for example, Jonathan Mountfort to Capt. John Worley, May 5, 1713, *North Carolina Historical and Genealogical Register* 2 (January 1901): 160, regarding the price of Negroes in Boston.

[65] Saunders, *Colonial Records* 2:260-261, 288, 310. Urmston continued: "here is no living without servants there are none to be hired of any colour and none of the black kind to be sold good for anything under 50 or 60"." In 1717 and 1718 he again wrote, insisting that he could not remain in North Carolina without two field workers and a domestic servant.

[66] See, for example, entries for July 15, 1715, May 28, 1717, and March 7, 1718/9, Pollock Letter Book, Pollock Papers.

[67] See, for example, *North Carolina Magazine* (New Bern), August 3-September 14, 1764; *Cape-Fear Mercury* (Wilmington), May 18, 1774; *North-Carolina Gazette* January 13, 1775. For references to notices of slaves" being imported during the 1780s, see Alan D. Watson, *An Index to North Carolina Newspapers, 1784-1789* (Raleigh: Division

of Archives and History, Department of Cultural Resources, 1992).

[68] *Commerce of Rhode Island* 1:414.

[69] See appendix 3 and above, p. 17.

[70] John Brickell, *The Natural History of North-Carolina* (Dublin: printed by James Carson, 1737), 45, 272.

[71] A. Roger Ekirch, *Poor Carolina: Politics and Society in Colonial North Carolina, 1729-1776* (Chapel Hill: University of North Carolina Press, 1981), 11, 14. Ekirch stated that the issuance of paper currency prevented North Carolina merchants from engaging directly in the Atlantic slave trade, but that assertion is doubtful. Virginia merchants were also unable to participate directly in the slave trade with West Africa. See Susan Westbury, Analyzing a Regional Slave Trade: The West Indies and Virginia, 1698-1775, *Slavery and Abolition* 7, no. 3 (1986): 241-256.

[72] Jacob M. Price, Credit in the Slave Trade and Plantation Economies, in *Slavery and the Rise of the Atlantic System,* ed. Barbara L. Solow (Cambridge, England: Cambridge University Press, 1991).

[73] See appendix 3.

[74] Crittenden, *Commerce of North Carolina,* 98-99.

[75] Crittenden, *Commerce of North Carolina,* 96n. Frederick Gregg possessed town lots, residences, stores, stocks of goods, and wharves, all in Wilmington; a house and lots in Campbellton; and plantations, sawmills, a gristmill, periaugers (small canoelike vessels), canoes, and several oceangoing vessels. He was a Loyalist who left North Carolina in 1777. Cornelius Harnett (1723-1781) was a whig leader. Crittenden, *Commerce of North Carolina,* 110, 142. See also Robert D. W. Connor, *Cornelius Harnett: An Essay in North Carolina History* (Raleigh: Edwards and Broughton, 1909).

[76] Crittenden, *Commerce of North Carolina,* 97. Samuel Cornell was a Loyalist (p. 142).

[77] See appendix 2.

Colonial Records Project Home Page | Subjects Home Page

North Carolina:

Entry Location	Year	Ship Name	Voyage	Embarked	Arrived
Roanoke (Edenton)	1702	*Anne*	Africa>Virginia (64)	7	1
Unknown	1755	*Thomas and Martha* #90370	Windward Coast	230	197
Unknown	1759	*Hannah* #90787	Windward Coast	301	258
Unknown	1760	*Grenville* #77714	St. Louis	230	197
Unknown	1761	*Grenville* #77759	St. Louis	230	197
Unknown	1766	*Nancy* #75900	Gambia>Grenada	169	150
Unknown	1767	*Squirrel*	Africa	250	208
Unknown	1768	*Harlequin #91413*	Sierra Leone	148	131
Beaufort	1769	*NN*	Africa		36
Unknown	1770	*Harlequin* #24668	Africa>St. Kitts	250	208
Brunswick	1771	*NN*	Africa		7
Unknown	1773	*New Market* #24720	Africa>South Carolina	149	"a parcel"
New Bern	1774	*Hope*	Africa		80
Brunswick	1784	*John*	Africa>Charleston		25
Brunswick	1784	W*ilmington*	Africa>South Carolina		40
Roanoke (Edenton)	1787	*Camden*	Africa		70
Roanoke (Edenton)	1787	*Camden*	Africa		80
Roanoke	1787	*Jenett* #36530	Africa	72	81
Unknown	1807	*Alcide* (a) *Alcade* #90370	Windward Coast	230	197
		Africa	70		

Legacies of Slavery

A Resource Book for Managers of Sites and Itineraries of Memory

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1 The UNESCO Slave Route Project wishes to pay tribute to Mr Su[illegible] who passed away on 12 July and was the Director of the UNESCO Chair in Intercultural Relations and Learning University of La Réunion, France.

SLAVE TRADE AND SLAVERY ROUTES

Sugar, coffee, cotton, tobacco
Cheap jewellery etc., weapons
Trans-Atlantic slave trade
Trans-Saharan slave trade
Indian Ocean slave trade
European or American slave-ship port
Large slave-trade port in Africa
Sorting and distribution centre
Raiding zone
Slave import zone
BOBANGI (Supply source of the trans-Atlantic slave trade)
Percentage of deported slaves

BENIN and GHANA are current designations of areas called differently at the time of the Slave Trade

THE SLAVE TRADE AND THE POPULATION OF THE AFRICAN CONTINENT

Aggregate number of deportees from the 8th to the middle of the 19th century for all slave trades: **24 million** at least.

Total African population in the middle of the 19th century: **100 million**

Estimated total size that the African population would have reached in the middle of the19th century in the absence of any slave trade: **200 million**

%10 %40 %40 %10

Charleston, Mexico, Veracruz, JAMAICA, CUBA, PUERTO RICO, Santo Domingo, Cartagena, Pernambuco, Bahia, Rio de Janeiro, Montevideo, Buenos Aires, Valparaiso, EQUATOR

Azores Islands, Canary Islands, Cape Verde Islands, GORÉE Island, Lisbon, Seville, Liverpool, London, Bristol, Amsterdam, Rotterdam, Copenhagen, Nantes, Bordeaux, Venice, Genoa, Rome, Palermo, Istanbul, Ouargla, Tripoli, Alexandria, Marzuq, Aswan

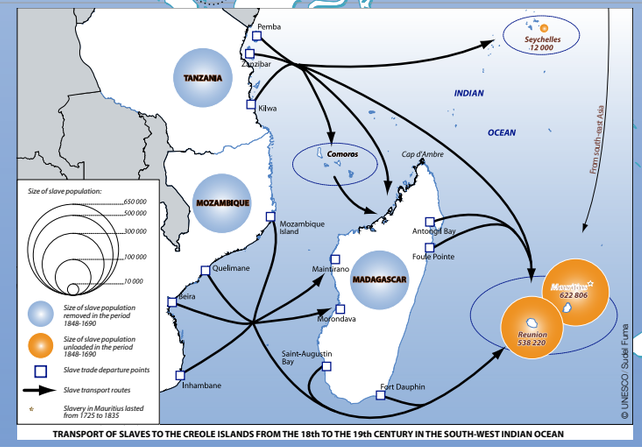
Timbuktu, BAMBARA, GHANA, BENIN, YORUBA, ASHANTI, HAUSA, BENIN, Ouidah, Lagos, Elmina, Accra, Calabar, Slave Coast, BOBANGI, LUNDA, LOANGO, KONGO, NDONGO, Cabinda, Luanda, MBUNDU, OVIMBUNDU, MAKUA, Quelimane

Basra, Zabid, Aden, SOCOTRA, Karachi, Goa, Malaka, Nagasaki, Canton, Macao, Moslem Trading Ports, Mombassa, ZANZIBAR, Tamatave, MADAGASCAR, MAURITIUS, RÉUNION Island (Bourbon)

Robben Island

ATLANTIC OCEAN

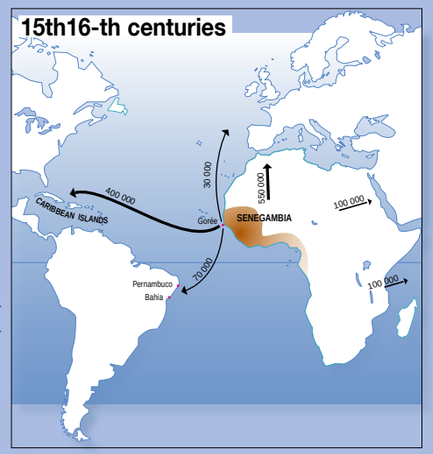
INDIAN OCEAN

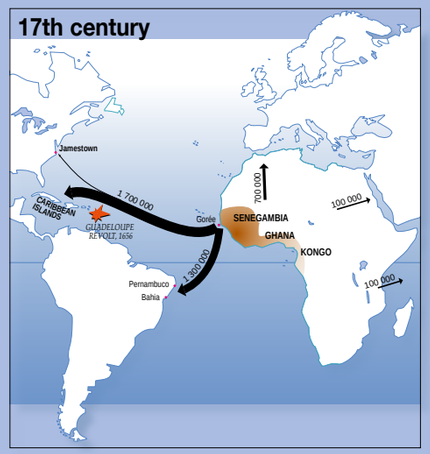


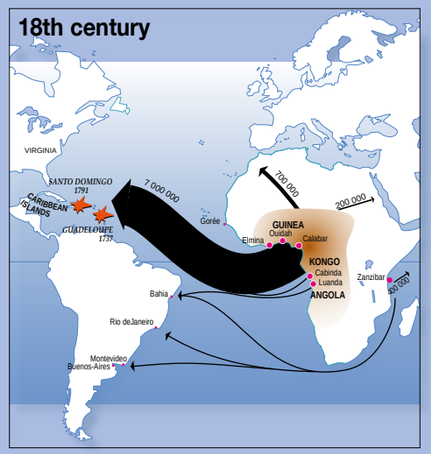
TRANSPORT OF SLAVES TO THE CREOLE ISLANDS FROM THE 18th TO THE 19th CENTURY IN THE SOUTH-WEST INDIAN OCEAN

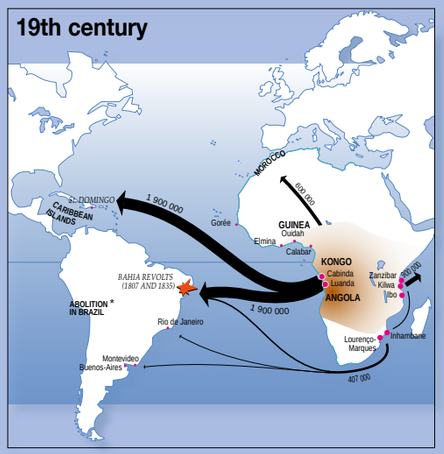
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DEPORTATION FLOWS









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Introduction

'Since wars begin in the minds of men, it is in the minds of men that the defences of peace must be constructed.' It was with this awareness of the challenges of peace that the Constitution of UNESCO, an organization created in the aftermath of the Second World War, decided to build new global solidarity and international cooperation through education, science, culture and communication. Its ethical role is based on the observation that the war was made possible *'by the denial of the democratic principles of . . . dignity, equality and mutual respect' . . . , 'and by the propagation, in their place, through ignorance and prejudice, of the doctrine'* of human inequality and differences among peoples. What is the mission of this United Nations specialized agency? To spread a sense of universal solidarity as providing the foundations for sustainable peace and development, in particular by raising awareness of the universality and indivisibility of human rights, and promoting cultural diversity and intercultural dialogue

An ethical project

The Slave Route Project was launched by UNESCO in 1994 to translate this declaration of principles into concrete action acknowledging a tragedy that had been ignored for too long.. It built on the work carried out in the General History of Africa, which had started in the early 1960s. The aim was to study the slave trade, slavery and its abolition in different regions of the world, from the perspective of intercultural dialogue and the culture of peace. An essential part of this enterprise was to reveal the operating methods, the root causes and the actual consequences of this human tragedy, as well as the lasting transformations, productive interactions and rich cultural heritage produced by these forced encounters, ad to contribute to thinking on the new challenges and issues facing modern and multi ethnic societies. The project is structured around five key fields of activity: scientific research, the development of educational materials, the preservation of written archives and oral traditions, the promotion of living cultures and contributions by the African diaspora and, lastly, the preservation of memorial sites.

The actions stemming from UNESCO's commitment to reveal the contribution of African cultures to humanity's heritage and its overall progress will serve as starting points for implementing the objectives of the International Decade for People of African Descent (2015-2024), proclaimed by the United Nations in 2014, with the theme '*Recognition, Justice and Development*'.

One of the most decisive advances in the fulfilment of this duty to history and memory, to which the international community is committed, was made in 2001, at the World Conference against Racism, Racial Discrimination, Xenophobia and Related Intolerance, in Durban, South Africa, marking international recognition of the slave trade and slavery as a crime against humanity.

> *We acknowledge that slavery and the slave trade, including the transatlantic slave trade, were appalling tragedies in the history of humanity not only because of their abhorrent barbarism but also in terms of their magnitude, organized nature and especially their negation of the essence of the victims, and further acknowledge that slavery and the slave trade are a crime against humanity and should always have been so, especially the transatlantic slave trade, and are among the major sources and manifestations of racism, racial discrimination, xenophobia and related intolerance, and that Africans and people of African descent, Asians and people of Asian descent and indigenous peoples were victims of these acts and continue to be victims of their consequences.*
>
> Durban Declaration, 2001, §13

Can we imagine more symbolic progress in the fight against different forms of slavery, both past and present?

From a duty to remember… to the right to History

In highlighting and reappraising the contributions of African cultures to the enrichment of societies in other regions of the world, the preservation, appreciation and promotion of tangible and intangible heritage constitute important challenges in the societies affected by the slave trade and slavery. This is why UNESCO, as part of its Slave Route Project: Resistance, Liberty, Heritage, has launched a programme responding to the imperative of forging 'a close link between the ethical exigency of preserving the memory of the slave trade, which historians now consider to be "the biggest single tragedy in the history of man on account of its scope and duration", and the current requirements of economic and social development' (Accra Declaration, Ghana, 1995).

This led to the establishment, in 1995, of a joint UNESCO-UNWTO (United Nations World Trade Organization) cultural tourism programme on the routes of the slave trade and slavery in Africa. A similar programme was launched for the Caribbean in 1999, in Saint Croix, United States Virgin Islands. Efforts focused primarily on the arguments for convincing authorities and civil-society organizations to engage in the identification, preservation and promotion work, while helping them to formulate new policies. The Accra Declaration on the Joint UNESCO-UNWTO Cultural Tourism Programme on the Slave Route advises States 'to make an inventory, evaluation and appraisal of the sites, monuments, and records in their territories' and affirms that 'the memory of the slave trade is etched not only on consciences but also on the monuments, sites, castles, forts, etc. which line, in a significant manner, the entire route'. While all of them bear witness to a world [illegible] many sites today belong to the common heritage of humanity because of their inclusion on UNESCO's World Heritage List. The Slave Route Project continues its efforts

today to increase awareness and rehabilitate, identify, assess, restore, preserve and promote memorial sites and routes linked to this history. Heritage plays a crucial role in raising public awareness and educating young people in the commemoration of this tragedy, as well as ensuring national reconciliation and building social cohesion. This role is increasingly acknowledged and asserted and is at the heart of memory policies. Indeed, reflection on the right to remember has underlined the cathartic, liberating values of facing the past, however painful it may be. Visiting memorial sites thus takes on critical importance for provoking necessary thoughts on the notions of humanity, dignity and freedom, ethical awareness and civic engagement. Furthermore, the inclusion of this history in national geographies and topographies has emerged as one of the best ways of combatting omission, denial and distortion of the facts.

In recent decades, many countries have acted to identify, document, preserve, enhance and link emblematic sites and monuments of the slave trade and slavery with a view to creating memory routes. These initiatives have been inspired by the expansion of the concept of culture and by the holistic approach to cultural and natural, tangible and intangible heritage developed by UNESCO's reflection and normative action in the cultural field.[1]

> *In its widest sense, culture may now be said to be the whole complex of distinctive spiritual, material, intellectual and emotional features that characterize a society or social group. It includes not only the arts and letters, but also modes of life, the fundamental rights of the human being, value systems, traditions and beliefs.*
>
> Mexico City Declaration on Cultural Policies, MONDIACULT, 1982

They address the wishes and aspirations expressed by communities most concerned to reclaim the sites of their history and participate in their management, governance, development and promotion. Without the mobilization of these communities and the perseverance of researchers and activists, these initiatives would never have taken shape.

The involvement of women researchers, professionals and volunteers in local communities highlights their major contributions to the research, identification, development, promotion and management of historical sites linked to the slave trade and slavery. Often very involved in transmitting the history and cultural traditions of a community, women are the main stakeholders in the development of cultural and memorial issues. Their role and involvement in the management of memorial sites and routes should be emphasized. It is all the more essential that young women be increasingly involved in all phases and at all levels of management, historical expertise, management of memorial sites and routes, archaeological research and tourism developments.

Today, a need exists to steer the partners wishing to identify and promote memorial sites in the right direction, and warn them against certain risks, such as the over-promotion of monuments. Indeed, the prime importance given to built heritage, such as fortifications, dwelling places, factories and furniture - developments that should demonstrate the wealth of the heritage, according to key criteria - often has the opposite effect, honouring the

1 Convention concerning the Protection of the World Cultural [illegible]al Heritage (1972), Convention on the Protection of the Underwater Cultural Heritage (2001), Convention for the Safeguarding [illegible]ngible Cultural Heritage (2003), Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005).

exploits of the slave system rather than the memory of the victims. In certain popular tourist destinations in the Caribbean and the Indian Ocean, this risk is very real, since the commercial obligation to satisfy tourists is strong and sometimes encourages the over promotion of colonial heritage. When one shows the houses of slave masters and what they produced but forgets to mention that the houses, fortifications and settlements were built by the slaves themselves, people miss the main purpose of developing historical and memorial heritage, which is to pay homage to the victims of this crime against humanity, their resistance against oppression, and their social, cultural and economic creativity in surviving the objectification that was their fate. It is therefore important to ensure a balance in presenting different experiences of this history, including different historical and memorial sites. It is equally useful to review the key criteria for appreciating the aesthetic, historical and tourism value of the heritage bound to this history. The criteria used should take better account of the distinctive features of this memory and the particular views and perceptions of the victims and their descendants on the symbolic, aesthetic, memorial and social value attached to the memorial sites.

By offering its support to the most relevant initiatives, the Slave Route Project intends to promote the preservation, management and development of the tangible and intangible cultural heritage originating from this history, and establish memorial sites and routes at the national, regional and international levels, by not only recreating the paths of slavery but also providing a link between the countries and the regions of the world that share this history. Its ultimate ambition is to build a world map of memorial sites and routes, to encourage the implementation of memory initiatives and promote the development of new solidarity between Africa and countries where its Diasporas are located.



I. A GUIDE FOR MANAGERS OF MEMORIAL SITES AND ROUTES

Photo: Candombe Uruguay
© 2008 by Sellanes

Long isolated and limited to a few famous sites of slavery and the slave trade (such as the Island of Gorée in Senegal, the Ghana forts and the Citadelle Henry Christophe in Haiti), historic towns (such as Salvador in Brazil and Cartagena in Colombia) and remains (such as plantations in the Caribbean), initiatives aimed at establishing this tangible heritage in national memorial landscapes have significantly increased, diversified and gained momentum over the last 20 years or so. This memorial heritage is often endangered, however, by ignorance of its historical value, negligence, a lack of means for managing it or even financial greed aroused by its value on the real-estate market.

Countries have adopted different strategies to preserve their memorial sites and monuments: inscriptions on the World Heritage List, which involves specific obligations; listings as national cultural heritage, which guarantee a certain level of protection; and the creation of memory routes promoted in cultural tours by communities and/or local authorities. Some combine these different strategies simultaneously.

Ambitious objectives

Site managers and authorities are therefore constantly facing challenges triggered by tourism development projects. Those challenges faced by managers of sites or routes linked to the history of the slave trade and slavery are specific to the very nature of the historical subject and include, for example, the possible loss of historical landmarks or their fall into oblivion; the gradual disappearance of this memorial heritage; and the extreme sensitivity of the subject.

Managers should be aware of the risk of certain pitfalls in approaching this theme. Important choices must be made to avoid a reification of the slave trade and slavery as a tourist product, along with other pitfalls linked to economic exploitation and speculation. It is important to prevent programmes of commercial exploitation and mass tourism, such as hotel areas and/or tourist recreation parks of a speculative nature.

The third challenge in the preservation and enhancement of memorial heritage linked to the history of the slave trade and slavery is the need to involve communities in reclaiming these sites. The commitment of the communities involved, especially by women and young people, is essential to the sound management of the site or route. It will enable them to benefit from the development and will provide them with economic and cultural tools of self-determination and identity.

This methodological guide intends to address these concerns by analysing the experiences of professionals working in the field, decision-makers involved in the development of public policy and researchers who have considered and discussed the topic. Its main objective is to offer assistance to the different stakeholders involved in memory policies and the management of heritage linked to the slave trade and slavery, in three main ways:

1. **Providing a frame of reference to government authorities** in charge of formulating development policies for historical heritage to support their efforts to identify, safeguard and develop tangible sites and monuments, as well as anti-slavery resistance and abolition movements.
2. **Providing managers with a methodological tool** to strengthen their capacity to address the different issues they are facing.
3. **Encouraging experience-sharing and partnerships** between managers of memorial sites and monuments to stimulate the creation of regional and international memory networks and routes.

This guide offers examples of best practices, identifies new approaches, defines guidelines, provides recommendations and promotes the building of networks. In short, it aims to boost the effectiveness of the management, development and promotion of historical and memorial sites and routes linked to the slave trade and slavery in different regions of the world.

In addition to addressing these needs specific to the operational development of memory tourism, this guide aims to raise awareness of the pitfalls and risks linked to promoting this specific memorial heritage, especially when tours highlight the wealth of buildings formerly owned by slave masters rather than the sweat and blood of the slaves who built them. It is important to take into account all the tangible and intangible legacies of the slave trade and slavery: the slave factories, the fortifications, the homes of the slave masters, but also the places where physical cruelty took place, the resistance sites and the achievements of slaves, considering that the symbolic, memorial and social value of such heritage does not always match the key criteria in terms of business, aesthetics and tourism.

Issues arising

Development of heritage sites, growing demand from the public and the emergence of memory tourism linked to the slave trade and slavery have raised certain ethical, socio-political and methodological issues.

These tragic places exude strong symbolism, emotion and apprehensions that are their most valuable feature, even more than the historical content and architectural wealth, which distinguish them individually from other tourist destinations. The historical roots, however, mean that they cannot be removed from their current geographical, economic and social context. In addition, a number of questions must be considered before establishing a memorial site or route in order to balance the demands and needs of national and local policies, local communities, particularly those concerned by this history, as well as tourists and visitors.

1. How can we understand the specificities and value of memorial sites in the local context?

In order to answer this big question, it is necessary to consider the following smaller questions for each site:

- What is a place of memory? Which places should be considered as such? How should they be promoted? Which priorities should be followed?
- How can this heritage be identified, protected, restored and promoted? How can we ensure that it is accessible and authentic? What methodology should be followed to identify, catalogue, restore and preserve it?
- How concerned do communities, elderly people, women, men and younger generations feel by the history of the slave trade and slavery?
- Who chooses the memorial sites and monuments?
- Are local communities involved in the decision-making processes related to the development of memorial sites?
- How do these sites fit into the local heritage landscape?
- What stories should be told to place the sites in the global history of the slave trade and slavery?
- What role should intangible cultural heritage play? How could this site be linked to some intangible heritage so as to enhance its impact and meaning?
- What kind of partnerships should be set up at the local, national, regional and international levels?

2. How can we determine the potential of memory tourism in terms of supply and demand?

In order to answer this question, it is necessary to evaluate, for each site, the following points:

- Which audiences are targeted by this heritage? What objectives does it serve? What are the opportunities and risks?
- How can we satisfy the demands of various audiences whose levels of information differ?
- How can we present and pass on history for which the archives are often insufficient and produced by the proponents of slavery?
- What is the expected reaction of the public during a visit to the site?
- How can we make the tragic nature of this history be felt?
- How can we produce a discourse that informs people of the tragic nature of this history but which also carries values essential to self-determination and commitment today?
- How can we encourage the public to engage in contemplation and reflection and show respect?
- Which educational tools, words, methods and channels can we use to teach the history of the slave trade and slavery during a visit to the memorial site?
- How can we make historical and memorial sites not only places for raising awareness and encouraging reflection, but also for promoting encounters, inte[illegible]l dialogue and openness to the future?

3. How can we understand capacity-building, the economic impacts and other consequences of memory tourism, especially for the populations involved?

In order to answer this question, it is necessary to evaluate, for each site, the following points:

- Since local populations are rarely prepared and trained to manage their memorial heritage, what role should they be given, particularly from a perspective of women's participation in the decision-making process and systematization of gender mainstreaming?
- How can we build their capacity to promote this heritage?
- Is the interest of managing memorial heritage solely financial?
- What are the cultural and societal consequences of memorial heritage, particularly for the communities concerned?
- Does the promotion of this tourist product risk trivializing expressions of traditional and popular cultures, trapping local communities in an essentialist perception?
- Will linking these sites to tourism make them artificial, turn them into a souvenir business and transform history into legends and myths?

A methodology to be built

This guide is the result of various actions undertaken by the Slave Route Project. The first action was to identify the stakeholders in the management and promotion of memorial heritage linked to the slave trade and slavery. A survey was carried out of site managers, museologists and representatives of cultural institutions to capture their experiences, problems encountered and recommended solutions. The most active of these stakeholders then met in 2012 in Brasilia, Brazil, at an international seminar to share information on practices and consider ways to improve their effectiveness.

Following this meeting, various courses of action were recommended:

- developing a methodological guide for stakeholders in the management, development and promotion of memorial heritage linked to the slave trade and slavery;,
- setting up training modules specific to the professions linked to this memorial heritage;
- creating a website and launching an international network of managers of memorial sites and places.

This guide represents the first outcome of these recommendations. It was developed in three phases:

1. Collecting information:

this includes responses to questionnaires and surveys from managers of memorial sites and monuments, presentations and experiences shared at the 2012 international seminar in Brasilia, and documentation provided by inventories, projects completed or under way, monographs and in-depth studies.

2. Identifying and selecting pilot sites and relevant experiences:

these are representative of all the world's regions, every type of site (including natural areas, forts, commemorative monuments, museums, plantations and archaeological sites) and every scenario, particularly in terms of management.

3. Developing content, following three principles:

(I) brevity in terms of presentation, with a focus on the context (stakeholders, historical roots and specific features of the site), the economic, ethnic, political and social challenges, the experiences that can be held up as examples, and the lessons learned (positive and negative impacts, opportunities and threats);

(II) concision and precision in the way the main ideas are formulated;

(III) and a focus on verified opinions and recommendations shared by the bulk of site managers, regardless of their origins, situations and future projects.



II. MEMORY POLICIES: IMPLEMENTATION FRAMEWORK FOR THE PROMOTION OF MEMORIAL HERITAGE

Photo: Forts and Castles, Volta, Greater Accra, Central and Western Regions (Ghana)
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Background

The transatlantic slave trade caused the largest and most concentrated deportation of human beings involving several regions of the world during more than four centuries. This tragedy has had immeasurable consequences, whose economic, psychological, social and political implications continue to this day. Following abolition, not only have the victims received no compensation – unlike the slave owners, many of whom were compensated – but they also continue to suffer discrimination, exclusion, racial prejudice and violence.

Several countries have decided to commemorate and honour, in diverse ways, aspects of their history relating to the phenomena of human trafficking and slavery as well as the process of resistance and abolition. These initiatives have sparked significant renewed interest in the historiography of the slave trade and slavery and in the study of their abolition, in particular regarding the transatlantic routes. To begin with, they have resulted in a reorientation of school curricula and a series of decisions seeking the recognition of a past that has often been forgotten or hidden and of communities that have faced discrimination. From a longer-term perspective, they allow for the identification and promotion of many places of history and memory, as well as the recording in national historical accounts of these facts that have played a role in building contemporary society.

It was during the period 1980 to 1990 that the duty to remember resurfaced in political debate through the demands of people of African descent. This campaigning prompted some States to develop policies calling for the tragedy of the slave trade and slavery to be commemorated and incorporated into their national narratives and the collective memory. Nowadays, there is an emergence of many dynamics pushing governments to mobilize more to implement memory policies related to the realities of the history of slavery and the local, national and international contexts. The identification, preservation, management and promotion of memorial heritage are thus part of the wider framework of national memory policies and contribute to their effectiveness.

Challenges

In adopting specific laws or incorporating them into their constitutions, countries with memory policies have, using different wordings, sought to respond to some major challenges:

1. **Officially recognizing** the contribution of populations of African descent to the building of the nations concerned and giving them the role and profile that they deserve in the national narrative.
2. **Admitting** that people of African descent constitute an important historical and current component of the nation and society.
3. **Establishing the history** of the slave trade and slavery as national historical realities whose consequences account for the disadvantaged status of women, men and young generations of the descendants of the victims of slavery.
4. **Establishing the right** to history and the duty to remember this part of human history that concerns society in its multidimensional aspects.

The legislation adopted on the slave trade and slavery proposes mainly to:

- < establish national days of memory;
- < encourage historical and scientific research;
- < promote historical figures associated with this history;

- develop teaching materials and incorporate them into school curricula;
- identify, safeguard and promote memorial sites and places and build commemorative monuments.

Examples

Significant legislative initiatives launched by States have included the following:

! Constitutional reforms:

Constitutions, the founding texts of nations, explicitly recognize the right to non-discrimination under the law. In some countries, particularly in South America, recognition of the rights of people of African descent expressly complements the right to non-discrimination and clarifies its implications. The following examples are provided in chronological order:

- **Brazil:** The Constitution of the Federative Republic of Brazil, promulgated in 1988, ensures the full exercise of the cultural rights of Afro-Brazilian people and access to the sources of national culture, as well as its enhancement, protection and dissemination (Article 215). The same article also states that 'the law shall provide for the establishment of commemorative dates of high significance for the various national ethnic groups'. Furthermore, Article 216 contains provisions for the safeguarding of tangible and intangible cultural heritage. Article 242 states that the teaching of Brazilian history shall take into account the contributions of the different cultures and ethnic groups to the formation of the Brazilian people'. Brazil has also proclaimed Black Awareness Day (Dia da Consciência Negra) celebrated each year on 20 November in tribute to the death of Zumbi, leader of the Quilombo dos Palmares in 1695. Law No. 12.519, of 10 November 2011 establishes this day as a national holiday throughout Brazil.
- **Colombia:** The Constitution of Colombia, promulgated in 1991 establishes the principle of a multi-ethnic and multicultural nation. Various laws specifically relating to people and communities of African descent have since been adopted.
- **Peru:** The Constitution of Peru, enacted in 1993, recognises, in Article 2.19 that every person has the right to his or her ethnic and cultural identity, and that the State recognizes and protects the ethnic and cultural diversity of the nation. In a reform passed in 2013, the explicit mention of people of African descent was added to Article 2.19.
- **Nicaragua:** In 1995, the reform of Nicaragua's Constitution, enacted in 1987, explicitly recognizes the existence of peoples of African and indigenous descent, the right to identity and the full enjoyment of the rights and guarantees enshrined in the Constitution. It also grants autonomy to communities of African and indigenous descent of the Atlantic coast.
- **Ecuador:** In 1998, the reform of the Constitution recognizes the existence of black people and people of African descent and guarantees them the enjoyment of collective rights similar to those enjoyed by indigenous peoples, in particular in terms of traditions, cultural and historical heritage, property, and the community organization and management of land and natural resources (Article 83).
- **Bolivia:** (Plurinational State of): Following the 2009 reform, the Constitution of the Plurinational State of Bolivia recognized, in turn, in Article 3, the partic[illegible] of Afro-Bolivians in the composition of the nation;

and in Article 32, that they enjoy the same economic, social, political and cultural rights as indigenous and rural populations. Article 100.2 stipulates that the State shall protect the knowledge of these peoples. Article 395.1 guarantees that Afro-Bolivian populations that do not have any or enough land, especially women from these communities, shall be provided with land in accordance with sustainable rural development policies, ecological and geographical realities and social, cultural and economic needs.

! Memory laws:

The adoption of a memory law is a strong symbolic step towards the official recognition of the past in the collective narrative of the nation. The duty to remember has thus been established by some pioneering States through the adoption of memory laws.

- **Brazil:** Law No. 9.394 of 20 December 1996 provides for Afro-Brazilian history and culture to be incorporated into school curricula. In particular, it recommends that 'the history of Africa and Africans, the struggle of blacks in Brazil, black Brazilian culture, and blacks in the creation of our national society should be studied so as to safeguard black people's contributions to the economic, political and social aspects of Brazilian history'. Law No. 10.639/2003 enshrined the two major political advances in favour of people of African descent and the recognition of their history and culture, establishing strong historical and memorial recognition by proclaiming a holiday for Black Awareness Day (*Día da Consciência Negra*), celebrated on 20 November each year since 1978, and by making the teaching of the history of the slave trade and slavery compulsory in Brazil's public schools. This educational component of the law shall be provided on the basis of the General History of Africa, published by UNESCO. The Congress also adopted, on 16 June 2010, the Statute of Racial Equality, aiming to eradicate discrimination that affects black people who have descended from slaves, while land has been restored to communities of Maroon descent, that is to say Africans who had escaped from slavery in the Americas. In 2012, Ana de Hollanda, Brazil's Culture Minister, established a working group to formulate directives for the construction of a national Afro-Brazilian Museum of culture and memory (Directive 148-2012 of November 2012).
- **France:** The law passed on 30 June 1983 established a public holiday in Guadeloupe, French Guyana, Martinique, Réunion and Mayotte to commemorate the abolition of slavery. Decree No. 83-1003 of 23 November 1983 established the 'dates commemorating the abolition of slavery in French overseas territories'. These dates were then supplemented by a decree of 23 April 2012, establishing days of memory for the abolition of slavery on 27 April in Mayotte, on 22 May in Martinique, on 27 May in Guadeloupe and Saint Martin, on 10 June in French Guyana, on 9 October in Saint-Barthelemy and on 20 December in Réunion. Act No. 2001-434 of 21 May 2001, (published in the *Journal officiel de la République française*, No. 119, on 23 May 2001), states in Article 1 that 'The French Republic recognizes that the transatlantic slave trade as well as the slave trade in the Indian Ocean, on the one hand and, on the other, slavery perpetrated, from the fifteenth century, in the Americas and the Caribbean, in the Indian Ocean and Europe, against African, Amerindian, Malagasy and Indian populations, constitute a crime against humanity'. The Act provides for changes to school curricula and research programmes in human sciences, which must 'give the slave trade and slavery the substantial place they deserve'. Article 3 calls for 'a request for recognition' of this crime by bodies such as the Council of Europe, the United Nations and other international organizations. Article 4 provides for the establishment of a 'committee of eminent persons' entrusted w[illegible]tifying sites and proposing actions 'that ensure the continued memory of this crime through the ge[illegible]ns'. In 2004, France, one of the first countries in the

world to pass a law of memory centring on the historic recognition of the slave trade and slavery, established a Committee for the memory of Slavery which, in 2009, became the National Committee for the History and memory of Slavery, tasked with developing an action plan and recommendations for the Government on questions relating to research, teaching, conservation, dissemination and the transmission of the history and memories of the slave trade, slavery and their abolition and supporting civil society stakeholders in approaches and projects relating to this history.

- **Senegal:** On 5 May 2010, Senegal was the first African country to adopt a law of memory with regard to the slave trade and slavery (Law No. 2010-10,). It recognizes, at the national level, the slave trade and slavery as crimes against humanity, proclaiming 27 April – corresponding to the date of the signing by the French Provisional Government of 1848 of the decree for the abolition of slavery in the colonies – as the date of national memory and underscoring the importance of assigning a prominent place to the history of the slave trade and slavery in school curricula.
- **United States of America:** Virginia was the first American State to acknowledge its responsibility for slavery and racial segregation. The resolution, adopted in 2008, states that the House of Representatives:
  - acknowledges that slavery is incompatible with the basic founding principles recognized in the Declaration of Independence that all men are created equal;
  - acknowledges the fundamental injustice, cruelty, brutality, and inhumanity of slavery and Jim Crow laws;
  - apologizes to African Americans on behalf of the people of the United States of America, for the wrongs committed against them and their ancestors who suffered under slavery and Jim Crow laws; and
  - commits to rectifying the lingering consequences of the misdeeds committed against African Americans under slavery and Jim Crow and to stopping the occurrence of human rights violations in the future.

! Memory months:

The adoption of memory months is a strong symbolic step in a process of recognizing the rights of people of African descent and building awareness of the intangible and tangible heritage, living cultures and the contribution of African culture and know-how to the nation. Black History Month takes place in February in the United States and Canada, and in October in the United Kingdom. Memory months have also been decreed in Venezuela, Colombia, Honduras and Peru.

This commemoration – originally lasting a week – was first introduced in the United States in 1926 on the initiative of the African American historian, Mr Carter G. Woodson as a tribute to Frederick Douglass and Abraham Lincoln, who were both born in the second week of February. It was expanded to the whole month for the bicentenary of the United States in 1976. Exhibitions, conferences, concerts, plays, educational activities and other cultural events mark this period. Moreover, National Freedom Day, celebrated on 1 February each year since 1948, marks the signing by Abraham Lincoln of the resolution proposing the 13th amendment to the Constitution of the United States abolishing slavery, which entered into force on 6 December 1865.

In Canada, by way of a motion brought before the House of Commons by Ms Jean Augustine, the first African-Canadian woman to be elected to the Canadian Parliament, February was officially declared Black History Month. The motion was unanimously adopted in December 1995 and the Government of Canada officially celebrated Black History Month for the very first time in 1996. It ce[illegible] in particular the flight to freedom of slaves from the South of the United States to the North via the so-called Underground Railroad in the 19th century.

In the United Kingdom, since 1987, October has been a period of celebrations marked by historical and cultural events recognizing this history. For the bicentenary of the abolition of the slave trade in 2007, events were held in the United Kingdom, especially in London and Liverpool, which was once the foremost slave-trading port in Europe. The first permanent museum on slavery – the International Slavery Museum – was inaugurated that year, dedicated to the transatlantic slave trade and slavery. Listed as a UNESCO World Heritage site, it is located in the Merseyside Maritime Museum in Liverpool, near the docks where slave ships once berthed.

- **In Venezuela,** Hugo Chavez's government implemented a policy to recognize and support people of African descent, which included the establishment of social missions to reduce the poverty of historically marginalized groups (2003), the Office for Relations with Afro-Descendant Communities (2005) in the Ministry of the People's Power for Culture and the Presidential Commission on the Prevention and Elimination of All Forms of Racial Discrimination in the Education System (2005). In 2005, 10 May was proclaimed 'Day of Afro-Venezuelanism' (*Dia de la Afrovenezolanidad*; Decree *No. 3.645. of 6 May 2005) and the month of May became the 'Month of Afro-Venezolanity'* (*Mes de la Afrovenezolanidad*). Since 2011, Venezuelan people of African descent – who currently number more than seven million – can identify themselves as such in the national census. In the same year, the demands of people of African descent led to the adoption of a law against racial discrimination (*Ley Orgánica contra la Discriminación Racial*). In 2012, the Venezuelan Government established the National Council for the Development of Afro-Descendant Communities (CONECAFRO). In parallel to these national measures, regional and municipal decisions have led to the commemoration of José Leonardo Chirino (Falcón State), Marron Juan Andres Lopez del Rosário (Yaracuy State), Ethnicity (Sucre State, at Carúpano, where Bolivar promulgated the first decree abolishing slavery on 2 June 1816), and the day of the arrival of the last slave ship in the state of Carabobo, every 25 May in front of the monument erected on the coast in Puerto Cabello, as well as recognition of the summit of Ocoyta (Cumbe de Ocoyta) as the natural and cultural heritage of the municipality of Acevedo in the state of Miranda and the resolution of the National Land Institute (INTI) to recognize Maroon ancestral lands in the municipality of Veroes in the state of Yaracuy as the collective property of the Afro-descendant community.
- **In Colombia,** in 2011, by a resolution of the Ministry of Culture, the month of May was declared 'African Heritage Month' (*Mes de la Herencia Africana*). This commemoration aims to celebrate and give visibility to the contribution of Afro-Colombian communities to the national culture. The Slave Route Project has played an important role as part of this process of recognition, and has since been invited to participate in debates on the history of slavery and its consequences as well as on the contributions of people of African descent.
- **In Honduras,** in 2012, the Government declared the month of April as 'African Heritage Month' (*Més de la Herencia Africana*), in part to highlight the Garifuna culture and promote its contribution to national culture. Many cultural events are part of this celebration.
- **In Peru,** in 2006, 4 June was declared 'Afro-Peruvian Culture Day' (*Día de la Cultura Afroperuana*) by the Congress of the Republic. This date pays tribute to Nicomedes Santa Cruz, the famous poet, journalist and defender of Afro-Peruvian tangible and intangible heritage. In 2014, the Ministry of Culture, by its resolution R.M. 182-2014, declared the month of June 'Afro-Peruvian Culture Month' (*Mes de la Cultura Afroperuana*). This decision was promoted by the Directorate of Afro-Peruvian Policies (*Dirección de Políticas para la Población Afroperuana* – DAF) particularly with a view to implementing public policies to improve the quality of life of this community.
- **In the Netherlands,** beginning in 1999, a national platform on slavery (*Landelijke Platform Slavernijverleden*) spearheaded the creation of the National Monument devoted to Dutch Slavery and its Legacy, unveiled in Amsterdam in 2002. This date was chosen to commemorate a slave uprising that began in the former colony of Curaçao on 17 August 1795.

Lessons learned

The relatively recent implementation of these legislative measures does not allow for a precise assessment of their effects. Nevertheless, useful lessons can be drawn from their stated objectives to:

1. **Establish and foster** openness to memory that takes many forms: commemorations and celebrations, enhancement of memorial places and sites, development of research and education on the slave trade, slavery and their abolition.
2. **Stimulate and give momentum** to initiatives in civil society: cultural initiatives by people of African descent, on the tangible and intangible heritage, by local communities; and educational initiatives by associations, schools and universities.
3. **Involve** various political stakeholders at the local, national and regional levels.
4. **Establish** referencing and a standing national framework to legitimize initiatives taken at various levels and ensure their long-term future.

* RECOMMENDATIONS

Legislative frameworks and laws on memory do not rewrite history, repair it or resolve the immediate economic, social and other problems facing people of African descent. They aim to fully reinstate the communities that suffered the worst violations of human rights to their place in in the general history and national narratives. It is a matter of ethical and historical reparation as part of reconciliation efforts.

To that end, the frameworks need to be:

1. The result of extensive consultation with the various stakeholders, especially people of African descent, as well as all women and men whatever their ancestry;
2. Developed in relation to the country's identity, according to its place in the history of the slave trade and slavery, the national social context, and the existing tangible and intangible heritage linked to that history;
3. Drawn up in a thoughtful and considered manner, as words and phrasing are of paramount importance for the chosen objectives;
4. Monitored and evaluated by a specific national committee that will also serve as an advisory intermediary between the grass roots and State organizations;
5. Enhanced by means of hard-and-fast policies to combat racial prejudice, discrimination and exclusion affecting people of African descent;
6. Integrated in specific policies and measures for achieving gender equality, a fundamental human right and a necessary condition for the achievement of international development objectives. To this end, they should be reinforced by specific policies aimed at the elimination of all forms of discrimination against women of African descent.



III. INVENTORIES: A NECESSARY STEP FOR THE DEVELOPMENT OF MEMORIAL HERITAGE LINKED TO SLAVERY

Photo: The Samba de Roda of the Recôncavo of Bahia, Brazil
© Luiz Santos / UNESCO

Preparing an inventory is a prerequisite to policy-making for the development, management, restoration and enhancement of the heritage of the slave trade and slavery, and for highlighting resistance, rebellion and abolition movements, as well as the legacies of that history. It is a crucial and complex task that centres on the intersection between historical and scientific research, architectural restoration and conservation, local community involvement, economic and tourism development, and efforts to mobilize regional and governmental bodies.

Background

Understanding the tangible heritage formed by the memorial sites and places linked to the slave trade and slavery gives rise to several difficulties.

1. **Being highly diverse and scattered** across very large areas, it is especially difficult to pinpoint and enhance knowledge of this memorial heritage.
2. **It comprises myriad evidence of the history** (sites, relics, natural components) and is not limited strictly to major architectural sites.
3. **It will disappear** if nothing is done to identify and register it in a national inventory, since many memorial sites and places have been destroyed and others urgently need to be preserved.
4. **Its historic importance** is not always clear, especially when memorial sites and places have had other functions and/or been restored for other purposes.

Objectives

1. **Identify and list** the sites, places and properties linked to the slave trade and slavery according to predefined criteria, including not only cultural and tangible but also natural and intangible heritage.
2. **Examine** their state of conservation and preservation, as well as the potential for restoring them, taking into account the technical conditions and existing competencies for each region.
3. **Inform** political authorities regarding their protection through listing in a national inventory and the adoption of specific measures and regulations.
4. **Assess their potential** with a view to promoting and integrating them into a memorial, cultural and tourism development approach, with the involvement of women, men and young generations of local communities.

In view of the cross-border dimension of the slave trade and slavery, any inventory of memorial sites should also consider places in neighbouring countries. Each inventory should comprise the following components: historical context; geographic location; a heritage status report; a designation and explanation of the site. Those components need to be illustrated by a varied range of documents such as maps, drawings, photographs and videos.

The inventory of historical and memorial heritage should be based on four sources: (a) written documents; (b) oral traditions, including songs, epic poems, legends, myths, proverbs and narratives; (c) the memories of the populations concerned; and (d) archaeological research and discoveries. Consensus on which sites to recognize is indispensable for the ultimate choice of target sites.

Recommendations for enhancing the sites must take into account the views of researchers, the population's wishes, the plans of local authorities and national memory policies.

Adoption of a typology

Every inventory must adopt a typology encompassing the full panorama of memorial sites linked to the geography and history of the territory concerned: architectural heritage (military architecture: forts, boarding or landing ports, lighthouses, prisons; religious architecture: churches, places of worship; sites of agribusiness production and commerce and residences: trading posts, warehouses, dwellings, lazarettos, slave markets, plantations); the natural heritage, including places of resistance and of Maroon communities (such as sacred trees, forests and woods, caves, lakes, swamps and rivers); the intangible heritage (including songs, dances, animal remains and relics), as well as the sites of rebellion and resistance, havens, the wrecks of slave ships and so on.

A descriptive fact Sheet, including all the above-mentioned elements, will need to be drawn up for each site, place or property.

! Examples:

- **Inventory of the memorial heritage in France (Fact Sheet 4)**: features one of the most extensive and comprehensive typologies in terms of categories of memorial sites and monuments, as its slave-trading practices covered several continents (Africa, the Americas, the Caribbean and the Indian Ocean) and the references encompass the entire historical process (the slave trade, slavery, resistance, abolition, legacies).
- **Inventory of the heritage trail of Guadeloupe (Fact Sheet 4)**: being aimed at networking, the approach followed for this inventory has been selective and non-exhaustive. The scientific committee and steering committee selected 18 of the 50 sites originally listed, based on multiple criteria (such as historical interest, accessibility, or conservation status). The approach, in fact, was as much operational as scientific.
- **Inventories in West African countries (Fact Sheet 1)** and in Portuguese-speaking African countries **(Fact Sheet 2)** offer a more thematic typology. Such practices are relevant in that they represent a standardized approach across several African countries, so we can call them inventories of transnational 'memorial spaces'.
- **Inventory of the memorial heritage in Cuba (Fact Sheet 5)** offers highly detailed and comprehensive descriptive fact Sheets covering the entire national historical heritage, including over 750 sites. This comprehensive approach is a major scientific effort for a country so rich in memorial heritage.
- **Inventory of the memorial heritage in Mauritius and Rodrigues (Fact Sheet 3)** gives prominence to the visual and, by incorporating not only visible historical and natural heritage sites but also redeveloped architectural sites, provides for a highly qualitative approach.
- **Inventory of African-Canadian memorial sites (Fact Sheet 7)** provides insight into another side of the history of the slave trade, slavery and their abolition: the legacy of communities of escaped slaves.

Lessons learned

The variety of experience in inventory work makes it possible to draw the following lessons:

! Benefits:

In the light of the work done in various places, inventories can be seen to have made it possible to:

< account for the memorial heritage at the national level and to reconstruct the history of slavery at the regional and even international levels;

< foster synergies among the various stakeholders (such as historians, researchers, communities of African descent and local authorities);

< rediscover parts of local and regional history that had disappeared or been forgotten;

< generate or strengthen local dynamics in terms of tourism attractions, underpinning events through living culture.

! Constraints and risks:

From a practical point of view, inventory work can be undermined by a range of negative factors and risks, such as:

< the lack of a standardized approach, scale of implementation, typology or access to sources;

< the emotion felt by local people of African descent upon seeing this painful past reappear and becoming the custodians of its memory;

< the refusal of governments and local politicians to incorporate what they see as the unappealing image of slavery into the tourism-oriented promotion of their heritage, centring on culture and recreational activities;

< a lack of governance and coordination at the local, national and regional levels, institutional red tape and, in some cases, competition between ministries (culture, tourism, social development, interior);

< insufficient funding for projects, technical assistance, training and so on;

< competition between stakeholders and the existence of multiple inventories using different methodologies;

< greed and conflicts of interest between local communities, local authorities and economic stakeholders.

! Opportunities:

Notwithstanding the difficulties, the development of inventories serves to facilitate:

< dialogue between the various national and local authorities (culture, tourism, domestic affairs) with a view to better coordinating their action in enhancing and promoting the memorial heritage and tourism development;

- historical and cultural repossession of memorial sites and monuments and the fostering of synergies between living cultures and the memorial heritage;
- training of local staff on problems specific to sites and places linked to the slave trade and slavery, as well as for professional guides hired by tourism agencies. The training of this staff would contribute to local economic development.

* RECOMMENDATIONS

The establishment of a national inventory of memorial sites and monuments – a prerequisite for any heritage enhancement or memory tourism development – must be based on seven key functions and the following order:

1. ***Elaborate** a typology and nomenclature for historical and memorial sites and spaces that is as comprehensive as possible, covering not only the tangible built heritage but also the intangible and natural heritage.*
2. ***Prepare** an exhaustive descriptive fact Sheet that highlights the identity of each site.*
3. ***Use** the various sources of information available to tell the story of each site, such as written documents, oral traditions and local memory.*
4. ***Specify** the intended objectives of the inventory, such as historical and scientific research, knowledge and protection of heritage and identifying opportunities for tourism development and diversification.*
5. ***Identify** the women, men and partner organizations most qualified to produce the inventories, with the assistance of experts. Establish, to that end, a multidisciplinary and gender-balanced steering committee (researchers, local and national policy-makers, historians, tourism operators and so on).*
6. ***Incorporate** the sites and monuments identified into a memorial route that provides an overview of the geographic and historical context.*
7. ***Avoid** commercial and speculative pitfalls when establishing heritage inventories and valuations relating to the slave trade and slavery, as well as the resistance and abolition movements that arose.*



IV. ORGANIZATION AND MANAGEMENT OF THE SITES

Photo: Language, dance and music of the Garifuna
© National Garifuna Council/UNESCO

The opening of new memorial sites and places, improvement of historical sites, interest shown by public authorities, mobilization of communities of African descent and progress observed in the field of tourism have led to advances in both the theory and practice associated with the management, organization and development of this type of heritage. Constrained for many years by lack of space, organized by enthusiastic volunteers restricted by limited resources, memorial heritage launches face new challenges for their preservation, promotion and use for development, education and cultural outreach.

Background

The development of memorial sites and monuments has long been restricted by unfavourable local, regional or national circumstances (taboo subjects, little interest in those sites seen as less prestigious, priority given to other forms of tourism or cultural development). Moreover, their appeal has been limited by a lack of community engagement and public demand. Lastly, isolated and lacking sufficient, well-adapted resources, site managers are hardly in a position to strengthen their expertise by acquiring new skills, especially in the area of new technologies.

Challenges

In order to catch up with the advances made by other forms of tourism, memory tourism must overcome several challenges: training managers with the necessary skills so that historical and memorial sites and places can be opened up to a wider audience; encouraging managers to develop an entrepreneurial spirit and their teams to be part of a network; repositioning the heritage of memory within regional history, supporting its local legitimacy, uniting local communities and decision makers to create more equally shared projects.

Examples

Many places of memory have anchored themselves in history, identity and local culture, establishing more or less visible links with others, whether on a local, regional or international scale. Take a look at the following initiatives, which provide us examples of technical management (in terms of protection, conservation and restoration), the organization of events, financing, historic research, planning cultural events, training, awareness raising and education:

- **Slavery Memorial Garden on the Island of Mozambique, Mozambique (Fact Sheet 11)**: restoration was carried out with the aim of creating a joyful and symbolic site, as part of a regional network linking other sites in the Indian Ocean region.
- **Frederick Douglass National Historic Site, United States (Fact Sheet 30)**: the house has been set up to give visitors an insight into the background and actions of one of the leading figures in the history of abolition, himself a former slave, of particular importance to African Americans.
- **Fort de Joux, France (Fact Sheet 40)**: over the last century, this historic castle, where Toussaint Louverture died in deportation, has been a site for local, national and international commemorations.

- **African American Civil War Memorial, Washington DC., United States (Fact Sheet 32)**: this national site, which pays tribute to a key period in the country's history, the Civil War (1861-1865), has been an important location for commemoration and various demonstrations.
- **National Museum of the Jesuit Estancia of Alta Gracia and the Residence of Viceroy Liniers, Cordoba, Argentina (Fact Sheet 25)**: this historic site increases the visibility of the memory of slavery through its activities and messages.
- **International Slavery Museum, Liverpool, United Kingdom (Fact Sheet 44)**: this museum, specifically designed and dedicated to slavery and the slave trade, uses a wide range of new technologies. The aim of the museum is to help the public to understand an issue, which is complex and often not well known and fulfils an educational role.
- **The Mémorial ACTe Slavery Museum, Guadeloupe, France (Fact Sheet 45)**: a large museum space devoted to the slave trade, slavery, the resistance they provoked, abolition and the cultures of the Caribbean that emerged from their history. It is a place for exchanges, knowledge sharing and education.
- **National Museum of African American History and Culture (NMAAHC), Smithsonian Institution, Washington DC, United States (Fact Sheet 46)**: a place of discovery, history and memory, where the United States of America links with its past to make it present and alive. It comprises a broad, comprehensive and cohesive collection, which was the ambitious project of the Smithsonian Institution.
- **Historic Centre of Salvador de Bahia, Brazil (Fact Sheet 18)**: this site, one of the most important in the history of slavery and the slave trade in Brazil, focuses on a living cultural offering devoted to Afro-Brazilian historical heritage.
- **Ogier-Fombrun Museum, Haiti (Fact Sheet 15)**: this museum, founded by a private initiative, combines visits to the site with hospitality thanks to specific financial support from a foundation.
- **The Shackles of memory Association, Nantes, France (Fact Sheet 43)**: this Nantes-based association seeks to promote historical research into slavery and the slave trade in Nantes, encouraging the work of historians, organizing conferences, visits and exhibitions and publishing an annual research review, with UNESCO's support.
- **Carter Godwin Woodson Home National Historic Site, Washington DC, United States (Fact Sheet 31)**: historical research relating to people of African descent and their culture lies at the heart of the centre's activities.
- **Fazenda Machadinha, Quissamã, Rio de Janeiro, Brazil (Fact Sheet 20)**: this historic site, testimony to a key period in the region's economic history, has not only restored the remains of the house but has also become a site for cultural activities.
- **Afro-Peruvian Museum, Zaña, Peru (Fact Sheet 26)**: this site was opened thanks to an initiative by a community of people of African descent who, beyond merely preserving colonial architectural heritage, have also highlighted musical heritage and the development of skills linked to music.
- **The House of Negritude and Human Rights, Champagney, France (Fact Sheet 40)**: as part of the network of sites along the slavery abolition and human rig[illegible], it organizes regular education and communication activities with schools.

- **Elmina Castle, Ghana (Fact Sheet 10)**: this site, which attracts a large number of national and international visitors, focuses on the training of guides.
- **Historical Museum of Villèle, La Réunion (Fact Sheet 29)**: this museum, located on one of the largest estates on the island, specializes in school visits.

Lessons learned

Despite their differences, the majority of sites have points in common regarding current changes and future prospects.

! Benefits:

Assessment of the different experiences and approaches adopted has highlighted:

- the effectiveness of mobilizing schools and teachers as a driving force for promoting the appeal of the local area in terms of its memorial heritage;
- as public interest increases, there is a growing interest from tour operators working in memory tourism to include new sites in a more extensive network;
- the involvement of younger generations of people of African descent in this type of tourism as activists promoting the duty to remember and as an income-generating activity;
- the reclaiming of memorial sites and places by local communities, their support of memorial projects and growing awareness by leaders of the need to better defend the history, culture and interests of people of African descent.

! Constraints and risks:

Despite many successful initiatives, there are still obstacles that stand in the way of development of this historical tourism:

- the lack of a shared vision between the different stakeholders involved in the management of memorial sites and places, lack of governance at an international level, and institutional sluggishness;
- the reticence or refusal of certain institutional and private partners to respond to the ambitions of local communities by giving them the necessary support so that they can take ownership of their heritage;
- the lack of technical assistance, training and coordination between the various players involved;
- the reluctance of private owners to reveal the historical links to slavery of sites and monuments they own;
- confusion between memorial projects and economic, political or social demands;
- the rapid commercialization of heritage, with financial motives taking precedence over ethical and historical concerns;
- developing sensational elements to the detriment of the recounting of real events.

! Opportunities:

The prospects of developing cultural tourism encourage collaboration and coordination between the different stakeholders at the local level. The requirement to answer the public's needs drives the diversification of the cultural offering and the professionalization of the women and men who manage the sites. Moreover, increased synergy between architectural heritage, intangible cultural heritage and contemporary creation allows for a global perspective on the issue.

* RECOMMENDATIONS

Places of memory have a vocation that is meant to last. Their management must also ensure that the legitimacy of each memorial project is established, based on a sound knowledge of historical context, keeping up with scientific research, by making its results visible, both internally and externally, and involving the local society as a whole, including communities of African descent, especially the younger generations and the resident population; avoiding the use of a victimizing or pessimistic discourse, and convincing the decision-makers as to the benefits of memorial projects. To be effective, a project aiming to promote memorial sites and places must therefore:

1. *Have well-defined objectives and a clear, interactive programme of action, linked to a network of partner organizations.*
2. *Assemble a team of competent, committed and well-trained women and men, who are open and innovative and share the decision-making equally.*
3. *Renew the site's appeal and reiterate its themes by developing new activities, social functions and commemorative events, for example in the form of exhibitions.*
4. *Showcase the significance of the site.*
5. *Beware of speculative commercial exploitation.*



V. DEVELOPING PARTNERSHIPS

Photo: San Pedro de la Roca Castle, Santiago de Cuba (Cuba)
© Silvan Rehfeld

Carrying a strong emotional and symbolic burden, the historical and memorial sites and places referred to in this guide convey emotions generated by a painful past with lasting consequences. This emotional burden requires that government agencies (such as cultural and tourism organizations), local development partners (local communities, government authorities) and visitors (national and international tourists and school audiences) develop a special approach.

Background

The management and development of memorial sites face three problems:

1. The memorial opening of tangible and intangible heritage marking one of the most tragic events of human history raises the question of whether, in the countries and regions concerned, it will be accepted by local populations and local, national and regional authorities.
2. This memorial heritage attracts visitors with very varied profiles in terms of their expectations and sensitivities; their reactions, however, such as disgust or feeling overwhelmed, will also be influenced by presentation (historical approach or staging of events).
3. The management and promotion of this heritage relies on players who must be able to respond to the technological requirements of the networking of memorial sites spread across several continents.

Challenges

When seeking partners, the aim must be to educate and convince people of the importance of recognizing historical sites and places in the local economic and heritage landscape so that this memorial heritage is seen as a forward-looking development project and challenge. In order to be effective, the approach must be educational, based on clear information and verified and shared historical references, to avoid unnecessary disputes and controversies. Therefore, without wishing to compromise historical truth, forget symbolic meaning or alienate the interest of local communities, the challenge is to reach a consensus regarding promotion of this heritage.

Examples

Given the multiplicity of partners and the variety of audiences, some memorial sites and monuments have adopted specific positions:

- **The Slave House, Island of Gorée, Senegal (Fact Sheet 9)**: recognition of a slave-trading house on the Island of Gorée, which became an internationally symbolic site, has enabled it to develop several private partnerships with national and international foundations and businesses for its promotion. Its inclusion in the UNESCO World Heritage List brought it international recognition.
- **The Citadelle Laferrière, Haiti (Fact Sheet 13)**: its links with United Nations organizations (UNESCO, United Nations Development Programme – UNDP), and its inclusion in the UNESCO World Heritage List have created conditions conducive to safeguarding activities.

- **Haitian National Pantheon Museum, Haiti (Fact Sheet 14)**: this museum of national history and memory was opened in 1983 following a proposal by the Government of Haiti. The prominent place it holds among national museums gives it a leading educational function for school audiences.
- **Slave Route Museum, Matanzas, Cuba (Fact Sheet 17)**: this museum was established by the Cuban Government in the framework of the Slave Route Project, alongside the country's action to preserve its particularly rich and diversified national heritage. It illustrates the country's political will and mobilizes institutional partners for its development and management.
- **Ouidah Museum of History, Benin (Fact Sheet 8)**: this site, located in an old fort, is very important in the history of the transatlantic slave trade because it is in the centre of the Bight of Benin, the epicentre of the trade. It brings together a series of heritage sites and remains, making up a real memorial space at the regional level.

Lessons learned

A number of key points arise from of this diversity of experiences:

! Benefits:

They have been made possible thanks to certain attitudes:

- the various stakeholders, through their good cooperation and understanding of the challenges of the project, have created favourable conditions for local communities, the population as a whole and policymakers to support the memorial project. This also favours the mobilization of financial, human and technical resources for the development and management of the site;
- the recognition at the national level of the memorial heritage, through inclusion in legislative measures and the creation of aid programmes to promote the involvement of local and economic stakeholders.

! Constraints and risks:

On the other hand, a variety of factors may make it difficult to develop partnerships and add new sites, or may pose risks:

- the choice by political decision makers to favour heritage items of other types which they see as more positive in terms of image and commercial prospects;
- the continued presence of cultural obstacles in relation to the history of slavery in certain regions, both in local communities and on the part of national or regional authorities;
- lack of information among local communities, or even attempts by politicians to exploit the issue;
- confusion between commemoration activities and the social, economic or political demands of local or regional communities and authorities.

< over-commercialization of memorial heritage, with content obscured by razzle-dazzle, where the pursuit of large-scale profit outweighs the interest of historical knowledge and respect owed to the sites and routes concerned.

! Opportunities:

< international recommendations, national mechanisms and local initiatives can encourage some partners to become involved, or strengthen their involvement, in sustainable memory tourism;

< the development of international tourism, efforts to diversify cultural heritage offerings and financial opportunities are factors which can encourage national and regional stakeholders to enter into partnerships;

< recognition of the importance of memory tourism with awareness promoted by current events. Its economic potential provides opportunities for private operators (such as hotels and transport companies) to gain market share or sales turnover (travel agents, for example).

* RECOMMENDATIONS

Good management of memorial sites and places connected to the slave trade and slavery involves two stages:

1. *Preparing a management and development plan, clearly defining the roles of public, private, local, national and international partners and the relations that should be established with each.*
2. *Maintaining constant dialogue between local and regional partners of memorial sites and places (regional and local authorities, communities of people of African descent, State bodies, and local population groups) which must be the essential and permanent backbone of all heritage-related activity.*



VI. MEMORY NETWORKS AND ROUTES

Photo: The capoeira circle, Brazil
© 2012 by TT Catalão /IPHAN

Networking of memorial sites and the creation of historical routes began in the 2000s, particularly in countries and regions where memorial initiatives had already been undertaken.

Background

Networking and the creation of memorial routes have satisfied the need to include isolated sites in a more global dynamic in terms of identification, attractiveness and development. Given their lack of financial, material, human and technological resources, they could not have achieved satisfactory levels of development on their own.

Challenges

Networking of memorial sites has:

1. **Created** local and regional historical and thematic legibility and led to attractive tourism offerings because it is complete and diverse.
2. **Promoted** the recognition by public authorities at the local, State and regional levels of the role of memory tourism in the development of the country and region, and thereby mobilized financial and technical resources.
3. **Optimized** the capacities of existing sites by pooling their resources in order to conduct joint activities.
4. **Given** access to new techniques and technologies, the creation of shared tools and the opportunity to conduct innovative activities and make their messages heard.
5. Through broader tourism offerings, **reached** a new audience, including travel organizers and guides locally and abroad (such as tourism companies, hotels and restaurants).

Examples

The first initiatives, launched in the early 2000s, fall into three groups:

! Local circuits:

Approaches vary according to the destination (town or region):

- **The 'Black Bordeaux' tourist trail, Bordeaux, France (Fact Sheet 42)**: this tour, initiated by people of African descent, highlights the history of the African presence in the slave trade port of Bordeaux.
- **Historical and archaeological trail celebrating the African heritage of Rio de Janeiro, Brazil (Fact Sheet 19)**: starting from the Cai do Valongo, it recounts the arrival of captives in Brazil.
- **The itinerary of memory (Fact Sheet 27)**: this tour takes in both urban and natural sites reflecting the history of slavery in Réunion.
- **Afro-Brazilian Tour (O Roteiro Afro) of São Paulo, Brazil (Fact Sheet 21)**: this tour reflects the various facets of the African presence in the city: cultural, tangible, intangible heritage, and abolition.

- **Lisbon, an African city - memory routes and sites relating to the African presence, Portugal (Fact Sheet 39)**: this tour follows the traces of the African presence in the heritage of the Portuguese capital, drawing attention to points that are seldom mentioned elsewhere (such as toponymy).
- **The Slave Route: memorial trails in Guadeloupe (Fact Sheet 16)**: based on a selection of sites, this route presents a summary of the various facets of the history of slavery in the island.

! Regional routes:

At the regional level, several initiatives have become fully-fledged tourist destinations:

- **The slavery abolition and human rights route, France (Fact Sheet 40)**: this route covers five sites and a number of historic figures relating to the abolition of slavery. It came about in 2004 on the initiative of the five local entities that own the sites. It was the first network to benefit from a common legal and financial approach.
- **Route of Freedom, São Paulo state, Brazil** (**Fact Sheet 22**): this network includes the sites of the Paraíba valley and traces the history of slavery in the region. Created at the suggestion of a local travel agency, this route is an innovative initiative.
- **Ribeira Valley Quilombola Tour, Brazil** (**Fact Sheet 23):** this route includes Afro-descendant communities based on their traditions. This is another innovative initiative: suggested and managed by the local communities concerned, it shows their desire to control the destiny of their own memory tourism.
- **The Gullah/Geechee Cultural Heritage Corridor, United States (Fact Sheet 35)**: this route reflects aspects of the living culture of the Afro-descendant community of the eastern coast of the United States.

! International networks:

Owing to the existence of cross-border memorial sites, networks have been created to reflect the transnational dimension of the theme of human trafficking from Africa, slavery and their abolition.

Examples of this include:

- **'Steles, Memory and Slavery' network in the Indian Ocean (Fact Sheet 28)**: by means of monuments and sculptures, this itinerary brings together historical roots of slavery and indentured labour in the Indian Ocean.
- **National Underground Railroad Network to Freedom, United States (Fact Sheet 36)**: this route commemorates slaves who escaped from slave-holding states to states in the northern United States and to Canada.
- **Association of African American Museums, United States (Fact Sheet 6)**: this is a network of several dozen museums in the United States of America dedicated to the history of African Americans.
- **The Shackles of Memory International Alliance (SMIA) (Fact Sheet 43)**: founded in Nantes (France), this is a network of towns on the five continents concerned by the slave trade and slavery, focusing on shared themes and a variety of cooperative activities.

Lessons learned

A great variety of operators are involved in these memorial projects. As for local routes, the initiative to create and manage a network often comes from local stakeholders: these include associations organizing visits, local authorities for the development of heritage sites, historians to design the visits, and tourist offices.

Regarding regional tours, projects generally come from the private sector and are initiated by a tour operator (travel agency) networking existing memorial sites and monuments, which it promotes and markets, while hosting the tours (The Route of Freedom in Brazil, for example). But initiatives can also stem from private citizens, particularly people of African descent, who, with support from external tour operators, organize and run memory tourism activities (such as the Ribeira Valley Quilombola Tour in Brazil).

There are also public-sector projects initiated ether by a single operator - where most of the sites belong to a local authority, such as the Traces of memory in Guadeloupe – or by a voluntary organization if the sites are owned by several local authorities, as in the case of the Abolition Route in France.

! Benefits:

- < support from public authorities at the local, national or regional level for the creation, funding, management and development of networks;
- < emergence of new demand for memory tourism, stimulated by networking and the availability of broader tourism offerings;
- < strengthening of the link forged between visiting tangible heritage and animation through living culture;
- < growth of a new dynamic among the stakeholders in charge of memorial sites, who enjoy the advantages of teamwork, including taking initiatives and feeling less isolated;
- < reduced reticence at the local or regional level in relation to sites that are part of a network.

! Constraints and risks:

In addition to obstacles such as inappropriate design, geographical barriers, disparities between sites, insufficient sharing of resources, indifference from the media and public authorities, the changes required by networking sometimes cause problems within teams owing to the adoption of new working methods such as the use of new information and communication technology, which can often create a generation gap.

! Opportunities:

Recommendations from international bodies such as UNESCO, national legislative provisions, current trends in tourism (such as the development of memory tourism) and new information and communication technologies are among the factors that promote capacity-building among managers and foster networking.

* RECOMMENDATIONS

While memorial sites provide new tourism offerings, networking is now essential for bringing about genuine local and regional development of memory tourism. Their success depends on three essential factors:

1. *A strong concept and clear positioning, which require:*
   (a) a network strongly rooted in heritage, both tangible and intangible, to which reference is made with a precise theme and a strong image reflecting regional identity;
   (b) a minimum number of historically consistent sites, attractive in terms of heritage and unanimously supported by local and regional community and political bodies;
   (c) a coherent and balanced circuit in an accessible geographical area;
   (d) prior definition of the type of project: a historical, memorial, heritage-based or mixed itinerary;
   (e) inclusion of prominent sites with a strong image to ensure the attractiveness and visibility of the network.

2. *A managing body, which must feature:*
   (a) distinct steering and scientific committees, the former responsible for content (heritage, historical, touristic) and the latter for operational matters (funding, logistics);
   (b) an organizational structure appropriate for what the network hopes to achieve;
   (c) a multi-year programme of action and development of tools for structuring the network.

3. *Balanced development of the system, which involves:*
   (a) not trying to cover everything or make the network include every single site;
   (b) adding sites to the network gradually, following rules defined in advance, with preference for sites offering added value thanks to their historical complementarity and budgetary capacities.
   (c) strengthening sites' identity-related positioning and their complementarity within the network.

In addition to benefits at the local, national and regional levels, the creation of memorial networks and itineraries is essential for international cooperation among commemoration sites and partners.



VII. NEW MEMORIAL SITES

Photo: Interior of the National Museum of African American History and Culture, Washington DC, United States
© Shutterstock.com / Lewis Tse Pui Lung

For several decades, the memorial heritage offering was limited to well-known sites (such as the Ghana forts, the Island of Gorée in Senegal, the royal palaces of Abomey in Benin and Salvador in Brazil), and some museums.

From the 1980s, the emergence of new memorial sites and monuments has been facilitated by a drive to remember the slave trade, slavery and their abolition, the mobilization of communities of African descent, various commemorative national and international events, and new cultural tourist destinations, which have all widened the geographical scope and diversified the criteria for identifying them.

Background

This new impetus has led to three new phenomena:

1. **The heritage offering has opened** up to new geographical areas (such as the Arab world, India and China) and new themes (indentured servitude in the 19th century), since the history of the slave trade, slavery and their abolition has concerned many of the world's regions (Africa, the Caribbean, the Americas, Europe, Asia and the Indian Ocean).
2. **A trend for reconstructing scenes** from cultural, business and social life during this period, although the loss of considerable heritage linked to the slave trade and slavery (architecture and documentation, as well as intangible aspects such as oral traditions) represents a barrier to historical accuracy.
3. **The claim by communities of African descent to ownership of their history linked to the slave trade and slavery**, their desire to know, assume and promote this history is becoming increasingly frequent and intense.

Challenges

In addition to the traditional challenges of managing, restoring and networking memorial sites and monuments, a number of new ones have sprung up:

1. **How can we make** the heritage offering more attractive and interactive, in other words livelier, while still respecting the historical truth?
2. **How can we respond** appropriately to demand by communities of African descent to reclaim their family history, facilitated by genealogical and genetic research?
3. **How can we include** local sites on maps and link them to other memorial itineraries without diminishing their specific features?

Examples

! Memorial parks:

< **Quilombo dos Palmares Memorial Park, Brazil (Fact Sheet 24)**: this project, which has recreated, from scratch, a site in its original historical region, opens a new chapter in the reconstruction of the history of Quilombo dos Palmares.

< **Colonial Williamsburg Foundation, Williamsburg, Virginia, United States (Fact Sheet 37)**: this project, which reconstructs lifestyles during the period of slavery, is particularly relevant for improving our understanding of the history of this nation and how it was built.

Lessons learned

Innovation and the opening of new memorial sites involves new stakeholders and has multiple effects.

! Benefits:

< the emergence of new initiatives on the history and memory of the slave trade and slavery in regions that have previously been reluctant to reconnect with the past;

< the emergence of new, more lively and more interactive memorial sites that attract new audiences;

< the promotion of sites using new techniques such as staging, on-site activities and communication;

< new historical and scientific research, especially in genealogy and genetics;

< the reclaiming of history by communities of African descent.

! Constraints and risks:

However, several difficulties threaten the smooth functioning of these new memorial sites, including:

< persistent cultural and political obstacles;

< lack of written and oral archives on the topic;

< possible mythification of this past, to the detriment of the historical truth;

< trivialization of a tragic past with artificial replicas in an attempt to sensationalize the subject matter, and a lack of methodical historical research when these are not ideologically ambiguous.

! Opportunities:

< The new trend for seeking family origins, driven by the rise of new technologies in genealogical research.

< The involvement of local communities in the und[illegible]ng, protection and development of this heritage;

- The opening of new research themes, the discovery of new sites that had fallen into oblivion, and of a specific period or aspects of this history.
- The growth of cultural tourism centred mainly on the discovery and knowledge of the history and culture of a country which allows development of a radically different offering from that aimed at mass tourism and leisure markets.

* RECOMMENDATIONS

It is essential for the field of memorial sites linked to the slave trade and slavery to be open to new dynamics, to become stronger in terms of geographical coverage, in-depth historical research, repossession of the history and mobilization of new audiences. However, new memorial sites and monuments must be carefully managed. We recommend the following:

1. *Inviting newcomers to join a network of experienced managers in order to benefit from their expertise, experience and good practices.*
2. *Adopting all the scientific and ethical precautions necessary in the development of initiatives aimed at reconstructing memorial sites or even scenes through interactive tools, in line with the historical truth.*
3. *Supporting the drive by communities of African descent to reclaim their history of slavery through genealogical research projects.*



VIII. GENERAL RECOMMENDATIONS

Photo: The Samba de Roda of the Recôncavo of Bahia, Brazil
© Luiz Santos / UNESCO

The analysis of various experiences at historical and memorial sites and places linked to the slave trade and slavery, resistance and abolition, as well as exchanges among stakeholders in this heritage have revealed a recent development that calls for a different approach to the development of these sites.

This approach involves:

1. Revisiting the concepts

For a long time, memorial heritage revolved around the best-known sites and main museums. Now, new initiatives are appearing:

- projects focusing on other geographical areas which are asserting a shared interregional or international history (such as the Indian Ocean);
- memorial sites connecting networks and routes, built and living heritage, tourism offerings and intercultural artistic encounters;
- development of new typologies and the promotion and enhancement of new themes to better reflect the implications of this history and memory and their links with current events (resistance, abolition and natural and intangible heritage);
- more rigorous, authentic search for historical identities;
- sites are seen as places for scientific meetings and research.

2. Specifying the challenges

Having long been marginalized, the history of the slave trade and slavery now enjoys a strong commitment by researchers and historians. This facilitates:

- integration of this area of history into national narratives,
- inclusion of memorial heritage in national schemes (inventories and requests to promote sites) and cultural and tourism policies;
- participation of local populations (especially those of African descent) and local authorities, with better coordination between the different players;
- access for all to these sites – which have become places for audiences to meet and engage in intercultural dialogue.

3. Remobilizing the stakeholders and audiences

With this impetus, new engagement has been observed among:

- governments, through legislation;
- communities of African descent;
- local and regional authorities, which include these memorial sites and monuments in their programmes of museums, heritage, festivals and events;
- tour operators;
- private businesses.

These stakeholders must be more mobilized through integrated strategies to promote synergy and collaboration.

4. Draw up a thorough inventory

- Develop standard categories and terminology.
- Prepare a standard fact sheet template.
- Use the various available sources of information.
- Define objectives.
- Determine the list of stakeholders and qualified partners.
- Integrate the sites into an itinerary.

5. Building capacities for managing sites

- Have clear objectives and a participatory programme of action.
- Focus on training and professionalizing managers (training modules adapted to regional contexts).
- Develop techniques and expertise for restoring heritage.
- Build capacities for sharing experiences and good practices (with a view to setting up memorial networks and itineraries).
- Raise awareness among local authorities of the economic potential of memorial heritage.
- Inform and train tourism businesses in the characteristics of memory tourism.
- Identify supporting institutions and organizations (foundations, universities, ministries, services and governmental commissions), including National Commissions for UNESCO and UNESCO field offices.

6. Setting up memorial networks and routes

The creation of memorial routes and networks requires a number of good practices, such as:

- Focusing the route or network project on well-known, leading heritage;
- Building on attractive and prominent sites;
- Proposing a varied and balanced offering across the network or route;
- Setting up a pilot organization (scientific committee, steering committee, bureau etc.);
- Supporting the different stakeholders and project owners (managers, tour operators, local authorities) who will have been convinced of the benefits of setting up networks and routes (for example, for promoting and marketing tourism offerings, events and commemorations, especially through co-opting).

7. Developing lively, interactive initiatives

- Develop the 'living' aspect of intangible cultural, in addition to the tangible aspect of memorial heritage to boost its attractiveness to tourists and help communities of African descent to reclaim it.
- In addition to global historical research, pursue research on personal and family roots.
- In consultation with relevant communities and researchers, meet public demand for this period of history to be shown, through living culture and the reconstruction or creation from scratch of historical places or scenes.
- In the implementation of these actions, the role of site managers is crucial. They are at the heart of networks set up by the different stakeholders. They must be able to mobilize partners in order to access extra resources to harness evolving technology in managing and organizing activities at historical and memorial sites and monuments. This is why this guide, which is a to[308]sing awareness about the new challenges, will also be accompanied by seminars and training modul[308]ized by geographical region, and the creation of an international network of managers of historical and memorial sites.

2. EXPERIENCE AND PRACTICES



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Fact Sheet 35: *Gullah/Geechee Cultural Heritage Corridor, North and South Carolina, Florida, Georgia, United States*
Fact Sheet 36: *National Underground Railroad Network to Freedom, United States*
Fact Sheet 37: *Colonial Williamsburg Foundation, Virginia, United States*
Fact Sheet 38: *Monticello, Thomas Jefferson's House, Charlottesville, Virginia, United States*
Fact Sheet 39: *Lisbon, an African city - memorial itineraries and sites of the African presence, Portugal*
Fact Sheet 40: *The Abolition of Slavery and Human Rights Route, France*
Fact Sheet 41: *Museum of the New World, La Rochelle, France*
Fact Sheet 42: *The 'Bordeaux Nègre' tourist trail, Bordeaux, France*
Fact Sheet 43: *The Shackles of Memory Association and Alliance, Nantes, France*
Fact Sheet 44: *International Slavery Museum, Liverpool, United Kingdom*
Fact Sheet 45: *Mémorial ACTe, Guadeloupe, France*
Fact Sheet 46: *National Museum of African American History and Culture (NMAAHC), Smithsonian Institution, Washington DC, United States*

I - INVENTORIES

Preamble

The experiences and practices listed in this section provide an international overview of memorial initiatives. They illustrate and complement the guidelines given in the first part of this guide and highlight good practices and lessons learned for those wishing to set up a memorial site or itinerary.

They show the remarkable diversity of projects focused on the history and memory of slavery around the world. While not exhaustive, this overview includes initiatives at international, national and local levels.

The specific actions described in these fact sheets will also help counter the isolation often felt by managers of historic sites and those developing memorial initiatives by reminding them of a sense of solidarity rooted in similar concerns and shared challenges.

These fact sheets also serve as an implementation tool for managers, many of whom are members of the International Network of Managers of Sites and Itineraries of memory, which was set up in 2013 by the UNESCO Slave Route Project.

It is hoped that these fact sheets will be a source of inspiration and guidance for site managers and a stimulus for the development of future local initiatives and of local and regional itineraries.

It should be noted, however, that UNESCO does not encourage or support initiatives aimed at developing mass tourism or associated speculative practices. Finally, UNESCO points out that the inclusion of historical and memorial sites and itineraries in this guide does not imply the partnership of UNESCO or its systematic approval of their content or implementation arrangements. Furthermore, the Slave Route Site label is granted according to a specific procedure explained in the appendix to this guide.

Many of the fact sheets demonstrate the involvement of local populations and gradual mobilization of the private sector around these painful and sensitive, yet fundamental, issues that underpin many contemporary societies. Others describe major government commitments that aim to give the history of slavery the place it deserves in national historical narratives and representations. Yet others illustrate the fact that a serious, documented memorial initiative is by no means incompatible with a place's touristic appeal.



Forts and Castles, Volta, Greater Accra, Central and Western Regions (Ghana)
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Fact Sheet 1: Inventory of the memorial heritage in West African countries

■ BACKGROUND

From the 15th to the 19th century, West Africa was the point of departure or transit for the transatlantic slave trade, the heaviest population deportations in world history (see the UNESCO Slave Route map). Between 13 and 15 million captives left from its shores, not only from coastal areas but also from the interior of the continent, East Africa, Mozambique and Madagascar.

This traffic of human beings has had immeasurable demographic, economic and political repercussions. It should be kept in mind that, for every captive arriving alive in the Caribbean and the Americas, historians estimate that five others died before that point, when captured, while being conveyed to the coast, imprisoned in warehouses or 'barracoons' along the coasts, or while crossing the Middle Passage. Inevitably, this process has marked the economic, geographical, human and social landscape of Africa. While the coastal regions were the façades, the whole continent was affected because the ramifications of the slave trade penetrated deep inland.

A few centuries later, what remains? While coastal countries have protected and maintained some visible architectural sites (such as warehouses, forts, royal palaces and ports), the interior abounds with places where the tangible traces have disappeared, either because of weather conditions or because of changes due to the development of roads and towns. As for the natural heritage (such as forests, caves and rivers), it has survived and still constitutes a major witness to the era of slavery (convoys of deportees, areas of refuge or resistance, etc.).

■ DESCRIPTION

The inventory initiated by the School of African Heritage (EPA), based in Porto-Novo, Benin, was finalized in 2004. It involved 12 countries and was led by a network of professionals from various sub-regions. It was based on a precise methodology that combined a thematic approach, location map, historical description and photos.

The inventory identifies:

1. Slave procurement sites
2. Gathering places
3. Slave markets and other places of sale
4. Places of refuge for people fleeing slave traders
5. Resistance sites
6. Itineraries of slave convoys (trails, rivers)
7. Slave depots and warehouses
8. Places for worship and ceremonies
9. Sites with Afro-Brazilian aspects
10. Forts used for various purposes (e.g. residences, prisons, warehouses, selling)
11. Former royal palaces used for various purposes (e.g. residences, prisons, selling, worship and warehouses)
12. Sites and ports of embarkation
13. Memorial monuments
14. Museums dedicated to slavery.

The method used combines a thematic approach, location map, historical description, photos and geographical distribution. In all, around 130 sites have been identified in the following countries: Benin (30 sites), Burkina Faso (2), Cameroon (12), Central African Republic (12), Chad (2), Congo (3), Côte d'Ivoire (5), Equatorial Guinea (10), Gabon (12), Ghana (12), Mali (12) and Togo (15).

The School of African Heritage (EPA) is an international postgraduate university institution specialized in the preservation and interpretation of both tangible and intangible cultural heritage. It trains professionals from 26 French-speaking, Spanish-speaking and Portuguese-speaking countries in sub-Saharan Africa in the conservation and promotion of cultural heritage.

Initially, the school's mission was primarily focused on the conservation, management and interpretation of collections in African museums. EPA then diversified its activities to include archives and libraries, and then built heritage and intangible heritage. Since its creation in 1998, EPA has trained more than 1,200 African heritage professionals, carried out more than 220 activities, put on four exhibitions, organized an international conference, published more than 50 reports, a newsletter, the proceedings of a conference, two tourist guides and 10 websites, and conducted four surveys. EPA is a self-financed institution that receives funding from a variety of sponsors.

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Mozambico - coast of Lake Malawi, Mozambique
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Fact Sheet 2: Inventory of the memorial heritage in Portuguese-speaking African countries

■ BACKGROUND

Portugal occupies a central place in the history of the transatlantic trade of humans, as early as 1441-1444, from the coasts of Africa and Cape Verde towards European shores and, in particular, the port of Lagos in the south of the country. It mounted the largest number of slave trading expeditions and deported more than 5.5 million captives out of a total of around 13 million. The Portuguese colony of Angola, in Africa, supplied the largest number of captives and the colony of Brazil was the leading destination, receiving more than 40% of the transatlantic slave trade. The last abolition of slavery in the Caribbean and the Americas took place in Brazil in 1888. The exceptionally long slave trade practised by Portugal for its own economic benefit and for other nations left many vestiges such as monuments, structures and buildings, natural spaces, as well as toponyms, ethnonyms, stories and legends. Built heritage, natural landscapes and collective memory all perpetuate this history shared by Portuguese-speaking areas in Africa, Europe and the Americas.

The inventory of memorial sites in the Portuguese-speaking areas of Africa seeks to identify, inventory and map this shared heritage so as to make known the diverse vestiges and evidence, both tangible and intangible, of that long colonial period.

All spaces in Africa - whether forests and rivers, or paths and roads - are inhabited by the presence of the past, whose traces must be kept alive. Monuments, objects, villages, trees, as well as words evoke this human experience.

■ DESCRIPTION

The Portuguese Committee of the Slave Route Project was one of the first to undertake an inventory of memorial sites and monuments in five Portuguese-speaking African countries: Angola, Cape Verde, Guinea-Bissau, Mozambique and Sao Tome and Principe. First published in 2000, *Lugares de memória da escravatura e do tráfico negreiro* was reprinted in 2012[1].

1 Comité português de " A Rota do escravo" – UNESCO, Lugar[illegible]ória da escravatura e do tráfico negreiro, Lisboa, Centro de Estudos Africanos da Faculdade de Letras da Universidade de Lisboa

The inventory distinguishes six categories:

1. Sites

a) Refuge sites
b) Places for loading, unloading and transporting slaves
c) Slave owners' production sites
d) Slave resistance and uprising sites
e) Slave landing and concentration sites
f) Slave market sites
g) Graveyards
h) Slave punishment sites
i) Slave-linked toponymic sites

2. Monuments

a) Fortresses
b) Churches
c) Mosques
d) Slave owners' houses
e) Hospitals

3. Buildings

a) Commercial buildings
b) Warehouses
c) Customs posts

4. Museums of slavery

5. Objects linked to slavery

a) Classified in museums
b) Recognized in depositories
c) Collected, pending classification.

6. **Shipwreck sites**

The method combined a thematic approach, geographical distribution, location map, historical description and photos. In total, the inventory, which included five Portuguese-speaking countries, identified around 400 sites: Angola (around 130 sites), Cape Verde (around 35), Guinea-Bissau (around 7), Mozambique (around 130) and Sao Tome and Principe (around 95).

This inventory work was steered by the African Studies Centre (CEA) at the University of Lisbon, the Amilcar Cabral Information and Documentation Centre (CIDAC) and the National Commission for the Commemoration of Portuguese Discoveries (*Comissão Nacional para a Comemoração dos Descobrimentos Portugueses*), in coordination with the National Committees for the Slave Route Project of Angola, Cape Verde and Sao Tome and Principe, the General Directorates for Culture in Mozambique and Sao Tome and Principe, and the Ministry of Commerce, Industry, Tourism and Artisans in Guinea-Bissau.

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Le Morne Cultural Landscape, southwest Mauritius
© Jasmina Sopova/UNESCO

Fact Sheet 3: Inventory of the memorial heritage of Mauritius and Rodrigues

■ BACKGROUND

Mauritius remained uninhabited until the Dutch settled there in 1638 and the first slaves were brought from Madagascar in 1642. When the French East India Company took possession of the island in 1715, economic activity began, and the commerce in human beings from Madagascar, Mozambique, and French possessions in West Africa and India was developed.

As a result, Mauritius had one of the most heterogeneous slave populations in the whole history of slavery. Slave ships unloaded their captives in both Réunion and Mauritius - between 300,000 and 400,000 - so it is difficult to know the exact number of captives brought to Mauritius itself. The British seized the island in 1810 and abolished slavery in 1834.

■ DESCRIPTION

The approach used to inventory memorial sites and monuments was interdisciplinary, combining anthropology, archaeology and history, with the methodology depending on the disciplines required. For some sites, owing to a lack of archival sources, only oral sources were available. An ethnographic approach was, however, only used in cases where the information was credible, in particular as regards rites and beliefs.

The use of different sources was not possible for all sites. It is likely that many sites have yet to be discovered and protected, for example slave arrival sites, slave display sites, slave markets, cemeteries, graves, and areas for Maroon communities.

The inventory of memorial heritage on the islands of Mauritius and Rodrigues presents a list of very diverse sites, including memorials, colonial settlements, and places of disembarkation, incarceration, industrial activity or Maroon communities. Many of the sites are only vestiges and, in some cases, no visible trace remains although the repercussions of slavery are still perceptible.

The inventory specific to Mauritius was completed with information about hundreds of sugar cane plantations and sugar mills, as well as camps where captives lived and worked in the 18th and 19th centuries, which require more in-depth study.

The inventory covering the Agalega islands, Mauritius and Rodrigues includes the following information:

1. **Location**
   a) Site
   b) Postal address
   c) Town, village or nearby area
   d) District
   e) GPS coordinates

2. **Description**
   a) Type of site
   b) Status and ownership
   c) Manager
   d) Characteristics
   e) Description of the site

3. **State of preservation**
   a) Surface area
   b) Restoration
   c) Hazards
   d) Condition

4. **Technical information**
   a) Period
   b) Key words
   c) History of the site
   d) Context
   e) Oral and intangible elements
   f) Information sources

5. **Practical and tourist information**
   a) Other nearby sites and tourist attractions
   b) Services and facilities available at the site.

In all, the national inventory assessed 67 sites: 2 on the islands of Agalega, 60 on Mauritius and 5 on Rodrigues.

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Memorial to the Abolition of Slavery, Nantes, France
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Fact Sheet 4 (1): Inventory of the memorial heritage in France

■ BACKGROUND

After Britain and Portugal, France was the third power in the transatlantic slave trade, deporting 1.6 million captives from Africa. Through the slavery system, France colonized and exploited its conquered possessions in the Caribbean, Indian Ocean and then Africa between the early 17th century and the late 19th century. As in other European countries that went through the same process, the legacy that France inherited from its long history of the slave trade, slavery, the resulting resistance and abolition, is expressed in an innumerable number of archival documents, objects, works of art and historical sites, the vast majority of which were long ignored or undervalued.

Although the first memorial initiatives date back to the late 19th century and early 20th century - busts of Victor Schœlcher in French Guiana, Guadeloupe, India, and Martinique, and the Toussaint Louverture memorial at Fort de Joux - it was only in the 1980s that a memory movement emerged on the occasion of commemorations in 1989 for the bicentenary of the French Revolution. Then, in 1998, on the 150th anniversary of the abolition of slavery, museums were opened, exhibitions held (for example at Champagney, Fessenheim, La Rochelle and Nantes) and commemorative dates set.

The passing of the Act of 21 May 2001 'for the recognition of the slave trade and slavery as a crime against humanity' reflected a desire to develop the memorial sites and monuments in the country. The establishment of the Committee for the memory of Slavery in 2004 set in motion the gradual inventorying of this memorial heritage beginning in 2006. In 2007, the French Archives Directorate, responding to the Committee's request, published the *Guide des sources de la traite négrière, de l'esclavage et de leurs abolitions*[1] (Direction des Archives de France, La Documentation française, 625 pages) providing an inventory of French archival holdings related to the slave trade, slavery and its abolition.

1 Sibille C., Guide des sources de la traite négrière, de l'esclava[illegible]eurs abolitions, Paris, Documentation française « Guides Archives de France », 2007.

■ DESCRIPTION

Initiated in 2006, the heritage inventory involved a variety of documentary holdings and stakeholders from the different regions of mainland and overseas France.

The inventory encompasses three geographical areas:

1. Mainland France
2. French overseas territories
3. Thematic and historical continuity in the former colonial empire. It has four categories:
    a. Sites linked to the slave trade
    b. Sites linked to slavery
    c. Sites linked to resistance
    d. Sites linked to abolition

Within the comprehensive notion of memorial sites and monuments, the national inventory covers not only tangible historical places and sites linked to acts and events relating to slavery, but also sources, stakeholders and events that contribute to disseminating and keeping alive this memory.

The inventory classifies the types of memorial sites according to the following typology:

1. Museums and other exhibition and display spaces that disseminate the memory of the slave trade, slavery, resistance and abolition

a) Specific museums
b) Museums with a dedicated permanent exhibition space
c) Museums with a dedicated temporary exhibition space.

2. Commemorative monuments that identify the memory of the slave trade, slavery, resistance and abolition

a) Busts and statues
b) Commemorative monuments
c) Plaques and inscriptions
d) Graves.

3. Urban complexes and ruins that still bear traces of the activities of the slave trade and slavery

a) Slave trading cities and ports
b) Cities and ports where slaves were disembarked
c) Production sites in the colonial economy
d) Various sites and structures related to slaves' work.

4. Individual buildings and specific historic sites retaining the memory of the slave trade, slavery, resistance and abolition

a) Historic houses and dwellings
b) Various historic buildings
c) Slave deportation sites
d) Places of slave torture and suffering
e) Symbolic towns and places.

5. Natural spaces and settings that evoke the history of resistance and abolition

a) Places of slave uprisings
b) Natural spaces for Maroon communities.

6. Memorial markers keeping alive the memory of the slave trade, slavery, resistance and abolition

a) Dedicated streets, squares and roads
b) Dedicated public buildings
c) Genealogical sites.

7. Stakeholders keeping alive the memory of the slave trade, slavery, resistance and abolition

a) UNESCO clubs
b) National associations
c) Local thematic associations.

8. Dates and events that honour the memory of the slave trade, slavery, resistance and abolition

a) International dates
b) National dates
c) Local and regional dates.

9. Resource and research centres on the slave trade, slavery, resistance and abolition

a) Universities and research centres
b) Ministries
c) The National Assembly and the Senate
d) Local authorities
e) Libraries
f) Local associations
g) Private stakeholders.

10. Other contacts and references on the slave trade, slavery, resistance and abolition

a) The Committee for the memory and History of Slavery (CPMHE)

b) Dedicated websites.

Contact:

Comité pour la mémoire et l'histoire de l'esclavage (CPMHE)
General Secretariat: Ministère de l'Outre-mer
27, rue Oudinot
75007 Paris
France
Tel.: +33 01 53 69 20 00
Website: www.comite-memoire-esclavage.fr



Grivelière House, Guadeloupe, France
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Fact Sheet 4 (2): Inventory of the memorial heritage in France

Inventory of the heritage circuit in Guadeloupe

■ BACKGROUND

A French possession from 1635 onwards, Guadeloupe was for more than two centuries - until the definitive abolition of slavery in 1848 - a major Caribbean centre for the production of sugar and, to a lesser extent, coffee, indigo, tobacco and cotton.

Guadeloupe was marked not only by the slave economy but also by various instances of insurrection and resistance from the very beginnings of colonization. The archives indicate that, as early as 1636, the first large camp for runaway slaves - called Maroons - was built on the heights of Capesterre and an early slave uprising occurred in 1656. Between 1730 and 1740, a series of rebellions took place in Guadeloupe and the surrounding islands. Slaves in Guadeloupe also showed resistance after the 1794 abolition of slavery, when a military expedition sent by Napoleon Bonaparte arrived in 1802 under the command of Richepance, who reinstituted slavery on 16 July. The uprising was violently suppressed, resulting in more than 10,000 deaths in the space of a few months.

■ DESCRIPTION

The heritage relating to the history of the slave trade and slavery in Guadeloupe is considerable. It includes several dozen remarkable sites such as canteens, fortifications, indigo factories, mills, potteries and sugar mills. In addition to these structures, there are places with a more symbolic dimension, such as slave graveyards, sites of revolt and resistance, and Maroon settlements. Finally, various monuments, museums and steles complete the memorial landscape of the island. The approach used in Guadeloupe was not to conduct a scientific inventory with the aim of constituting the most exhaustive databank possible, but rather to draw up a list of the most well-known sites and places in order to develop memorial tourism. The criteria used for the inventory were therefore operational in nature.

1. Identification

a) Position of the site: current name - historical name - location.

2. General information

a) Historical
b) Current

c) Classification: production site - place of memory - historical site
d) Protection category: classified as a historic monument (HM) - listed HM - general heritage inventory
e) Interest of the site: because of its function - because of personal accounts
f) Accessibility: accessible - not very accessible - relatively inaccessible
g) Ownership status: public – private
h) Owner's name
i) Level of access: open - limited - exclusive.

3. Specific data

a) Location: rural - urban
b) Typology: historical site - archaeological site - natural site
c) Period of construction
d) Surface area
e) Description of the property.

4. Evaluation criteria

a) State of conservation: good - average - poor
b) Level of property integrity: high - medium - low
c) Significance of the property: exceptional - important - ordinary.

5. Management of the property

a) Management plan: yes - no
b) Name of the managing entity.

6. Intangible cultural events associated with the property

a) Cultural space: yes - no
b) Associated events.

7. References

a) People/organizations that provided information
b) Bibliography on the property.

The inventory focused on around 50 remarkable sites and was overseen by a scientific committee made up of site managers, archive staff, history teachers and members of archaeology and culture departments. It looked at all types of sites identified on the whole island and resulted in the implementation of a project entitled 'Slave Route. Traces-memories in Guadeloupe'.

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Community of rumbers from Callejón de Hamel celebrate their party every Sunday, Cayo Hueso, La Habana, Cuba
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Fact Sheet 5: Inventory of the memorial heritage in Cuba

■ BACKGROUND

The slave trade and slavery in the Americas and the Caribbean have left deep marks on the creation and development of nation states and territories affected by this tragedy for centuries. Breaking the silence on this period of history and recognizing the heritage of African cultures are the main objectives of the Slave Route Project: Resistance, Liberty, Heritage launched by UNESCO in 1994. Documentation, in the form of a registry, on all the cultural diversity that can be observed at the various memorial sites and monuments is vitally important if we wish to implement strategies, at both the national and regional levels, to preserve, develop and promote this heritage.

■ DESCRIPTION

A methodological guide to memorial sites relating to the Slave Route in the Latin Caribbean was initiated in the Dominican Republic in 2007. This database brings together for the first time natural sites, cultural spaces, built heritage, underwater heritage, and knowledge accumulated by communities, in compliance with UNESCO's standard-setting provisions in the areas of culture and nature: the Convention for the Protection of the World Cultural and Natural Heritage (1972), the Convention on the Protection of the Underwater Cultural Heritage (2001), the Convention for the Safeguarding of the Intangible Cultural Heritage (2003) and the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005). This inventory guide sets forth several objectives, namely to:

1. **Inventory** the diverse aspects of the slave trade and slavery and their historical and current narratives, with the collaboration of the communities concerned, in particular by presenting living cultures.
2. **Determine** the state of conservation and preservation of these cultural assets; help to promote them through effective management, which will take into account development strategies incorporating the participation of local populations, educational projects and tourism.
3. **Encourage** the study and protection of this legacy and raise awareness among the States parties to the 1972 Convention to register cultural assets representative of this memorial heritage on the UNESCO World Heritage List.
4. **Select** the most remarkable memorial sites and monuments, in particular those inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity, with the aim of publishing a reference work.

To meet these challenges, a very detailed model form was developed, which has seven sections:

1. Identification

a) Accession register
b) Code
c) National code
d) Current name
e) Historical name
f) Other denominations.

2. General information

a) Location: country - province - city
b) Use: original - current
c) Classification: cultural landscape - cultural itinerary - agro-industrial complex - building - site
d) Protection category: world heritage - indicative list - biosphere reserve - national/local monument - other
e) Function: port of disembarkation - slave market - place of confinement - dwelling - production site - site of uprising - refuge for Maroons - graveyard - shipwreck - religious site - route
f) Inclusion on the national list: yes - no
g) Accessibility: accessible - not easily accessible - access difficult - inaccessible
h) Ownership: State - private - mixed - other
i) Level of access: open - limited - exclusive.

3. Living cultural traditions associated with the cultural property

a) Characteristics of the community concerned
b) Environment of expressions of intangible cultural heritage: oral traditions and expressions - performing arts
c) Cultural space: yes - no.

4. Specific data

a) Cultural landscapes: location - place - population - type - eco-geographical characteristics - environmental conditions - surrounding landscape - natural and landscape importance - historical cultural importance
b) Cultural itineraries: route - area - extension - geographical scope - form - function - natural context - content - importance of the itinerary
c) Settlements of populations: situation - population - date of foundation
d) Agro-industrial building: location - description - address - typology - period - type of construction
e) Historical/archaeological/natural sites: situation - typology - habitat - description.

5. Evaluation criteria

a) Values: anthropological - archaeological - architectural - historical - military - social - religious - natural
b) State of conservation: good - average - poor
c) Integrity: intact - slightly transformed - transformed
d) Exceptional nature: unique - remarkable - ordinary.

6. Management of the cultural property

a) Existence of a resource management plan: yes - no - responsible entity - funding sources - threats
b) Tourism potential of the site: yes/no - description - tourism infrastructure
c) Existence of a transmission programme: yes/no - educational plan - UNESCO outreach project - other.

7. References

a) Verification of information about the cultural property: done - supervised - entity - date
b) Bibliography on the cultural property
c) Miscellaneous notes.

Once the registration parameters have been analysed and validated according to the definitions set out in the methodological guide, the requested information is entered under each heading in the form, which is available in printed and electronic formats. A model outline offers guidance for the final version, which provides a summary of the main characteristics of the cultural property, its historical development and the associated values.

In all, the Cuban National Committee has inventoried more than 576 cultural properties in the country.

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DuSable Museum of African American History, Chicago, United States
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Fact Sheet 6: Association of African American Museums, United States

■ BACKGROUND

The African American Museums Movement developed in the 1950s and 1960s in order to preserve the historical and cultural heritage of African Americans and ensure its rightful place in the history of the United States. The Movement works to raise awareness of this community's contributions to American society, especially in the area of culture.

In the United States - or rather, before American independence in 1776, in the Thirteen Colonies - around 20 captives from Africa were the first to arrive on the shores of Virginia near Jamestown in 1619, disembarking from a Dutch ship that had captured them from a Spanish slave ship. The development of tobacco farming in the north-eastern states generated a massive need for labour during the second half of the 17th century. The first 'black codes' were passed in Connecticut in 1690 and in Virginia in 1705. In the South, cotton farming developed later, as did the growing of sugar cane at the end of the 18th century. This agricultural activity, together with slavery, then followed the advancing conquest of territory into the western United States. Historians use the term 'Second Middle Passage' to refer to the long marches imposed on slaves from eastern states, such as Virginia, Maryland and the Carolinas, to reach new plantations in Tennessee, Alabama, Mississippi, Louisiana and Texas. In the 1840s, New Orleans became the largest slave market in the country.

In 1810, the number of slaves in the United States was estimated to be 1.1 million; by the early 1860s, that figure had risen to 4 million.

The history of slaves in North America is marked by numerous acts of resistance. The most famous rebellions in collective memory started in the east of the country, in New York (1712), Virginia and South Carolina (the Stono Rebellion in 1739). In the 19th century, the German Coast Uprising in Louisiana in 1811, and the revolts led by Gabriel Prosser in Virginia in 1800, Denmark Vesey in South Carolina in 1822 and Nat Turner in Virginia in 1831 were brutally suppressed.

■ DESCRIPTION

The Association of African American Museums (AAAM), representing the African American Museums Movement, was established to support museums with an African and African American focus, as well as professionals working to protect, preserve and interpret African and African American culture and history. The aim is for people of African ancestry and the general public to learn about Africa's contributions to world culture.

In the late 1960s, Margaret Burroughs, founder of the DuSable Museum in Chicago, and Charles H. Wright, founder of the Museum of African American History in Detroit, launched a lecture series for black museums, and from it evolved the National Association of Museums and Cultural Organizations and the Black Museums Conference, the first black museum association.

In 1978, a consortium of six black museums, with funding from the National Museum Act (administered by the Smithsonian Institution in Washington), presented several papers at participating institutions, which inspired the creation of a committee to lay the groundwork for a new organization, the African American Museums Association (AAMA). The Association's first office was at the National Center of Afro-American Artists in Boston, Massachusetts. In 1997, it changed its name, becoming the Association of African American Museums (AAAM).

The Association provides the public with online information, in particular geared towards students, researchers and the heads of cultural and museum studies on African American history. This includes a database of AAAM institutional members and affiliates, projects and programmes, guides for submitting research results, scholarships, grants, and authorizations for travelling exhibitions. In partnership with the American government, it also provides museum managers with information on federal legislation and on matters of museum policy and management through the publication of newsletters, a calendar of events and multimedia resources. It organizes meetings and conferences on the latest research. Lastly, the Association participates in efforts in the tourism field, at the local, regional and national levels, to attract visitors of all ages and from all walks of life to these museums.

The Association works in partnership with various cultural and educational institutions and research centres. Several members of the AAAM Board of Directors are also members of the Association for the Study of African American Life and History.

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Underground Railroad Memorial, Windsor, Ontario, Canada
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Fact Sheet 7: Inventory of sites of African Canadian memory, Canada

■ BACKGROUND

The trafficking and enslavement of millions of Africans generated a long history of resistance. During the 19th century, thousands of slaves in the United States fled northwards to states that had abolished slavery since the end of the 18th century and to Canada, where slavery had been abolished in 1834 and they could live in freedom. In Canada, the refugees reached as far as Nova Scotia in the east and British Columbia in the west, but most of them stayed in south-western Ontario. There, they settled in rapidly-expanding towns and cities and formed pioneer communities, clearing forests and developing new agricultural land. The network of secret routes that they followed with the help of black and white abolitionists as they fled is today known as the Underground Railroad. One of these abolitionists was Harriet Tubman (1820-1913), herself a former slave.

■ DESCRIPTION

In 2010, at York University in Toronto, the Harriet Tubman Institute for Research on Africa and its Diasporas launched a programme on African Canadian memorial sites to commemorate places of importance linked to slavery, resistance and the Underground Railroad in Canada.

Emphasis is currently on sites in Ontario associated with slavery, the Underground Railroad and the presence of black Loyalists. These Loyalists enlisted in the British forces during the War of Independence in the United States with the hope of being freed. They found refuge in Nova Scotia and then, after the War of 1812 between the United States and Great Britain, in New Brunswick.

At the outset, an inventory of more than a hundred important sites associated with slavery in Ontario was compiled. It included religious centres, sites of resistance and agricultural colonies created for the resettlement of former slaves. Communities of African ancestry were invited to take part in this memory project, and a questionnaire adapted to the situation in Canada was developed. This work was completed in stages, with the first 11 sites being presented and approved in March 2011. Other sites will follow.

For its part, the Harriet Tubman Institute focused on the itineraries of the Underground Railroad located in Ontario, which attest to slaves' resistance and escape to Canada from the United States.

Although most of the credit for helping runaway slaves was given to Quakers and white abolitionists, we now know to what extent the participation of people of African descent was crucial for the smooth functioning of the network. For example, new Canadians of African origin already settled in the country took care of the newly arrived. Anti-slavery associations were established to raise public awareness, abolitionist newspapers spread the message, and individuals - men as well as women such as Harriet Tubman - did not hesitate to return to the United States, risking their lives, to help the fugitives.

Dozens of sites in Ontario recall this movement towards freedom: places of arrival, refuge, gathering and settlement (such as churches, businesses, farms and houses). The flight of slaves to Canada did not go unnoticed; indeed some American slave holders did everything in their power to reclaim 'their property'. As a result, the memorial sites and monuments include courts and prisons. There are also places where acts of discrimination and racism towards the refugees occurred on Canadian soil.

The inventory covering Ontario is structured in four sections and includes the following categories:

1. General information

a) Category: cultural - cultural landscape - natural
b) Type of cultural heritage: site - museum - plaque - archives - library
c) Name of site
d) Address of site
e) Brief summary
f) Website
g) Physical setting and facility
h) GPS coordinates if available
i) Historical location
j) Site ownership and administration
k) Owner's name
l) Contact information
m) Open to the public
n) Accessibility of buildings
o) Promotional material.

2. Description of site

a) Type: district/neighbourhood - accommodation - structure - landscape/natural feature/graveyard - archaeological site - museum - plaque - object - other - historic building
b) Relevance to the history of the African diaspora (to be completed with documentation)
   – Slavery: slave - slaveholder - integrated slave
   – Resistance and Underground Railroad: resistance and rebellion - runaway - rescue - kidnapped slave - transportation itinerary - destination - 'station' and abolitionist refuge - major gathering place - event
   – Community: history - neighbourhood - church - active congregation - graveyard - education - industry and commerce
   – Gathering place
   – Legal: court challenge and decision - prison - court - other
   – Other: military site - commemoration of site and monument - association and person of historical importance
c) Education and interpretation programmes linked to slavery, resistance and/or the Underground Railroad.

3. History

a) Historical context
b) History and significance of the site in relation to slavery in Canada, resistance and the Underground Railroad
c) Historic designation and/or plaque
d) Additional functions
e) Bibliography.

4. Development of research: museums, archives and libraries with documents that are significant for research purposes

a) General description of the facility, its purpose or mission
b) Description of holdings and collections
c) Opening hours, appointment times
d) Additional information to be included.

The criteria used to designate recognized sites of national historical importance were examined as were the requirements of the National Park Service (NPS) in the United States for sites to be included in the National Underground Railroad Network to Freedom. It was proposed that the designation process should comply with the procedure described in UNESCO's methodology for conducting inventories of commemorative sites, as follows:

1. First contact with the owners/managers of the site and/or the local community of African descent
2. Initial research and data collection in cases where it has not already been done
3. Regular consultation with the community
4. Gathering existing information and/or drafting a new report explaining the importance of the site
5. Adding an appendix to the report with maps, illustrations, photos, etc.
6. Finalizing the description of the site.

The ultimate goal of this project is to constitute a large database, as accurate as possible, that will be regularly updated and made available on the internet. This database will be accessible free of charge to educators and the general public worldwide on the website of the Harriet Tubman Institute.

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II - HISTORICAL AND MEMORIAL SITES



View of the Ouidah Museum of History from the grounds of the old Fort of São João Baptista de Ajudá, Benin
© Tienstwatrankil, CC-BY-SA 3.0

Fact Sheet 8: Ouidah Museum of History, Ouidah, Benin

■ BACKGROUND

Of the 13 to 15 million Africans forcibly removed during the transatlantic slave trade, more than 2 million were transported from the Bight of Benin, 60% of them from the two main ports of embarkation, Lagos in Nigeria and Ouidah in Benin. In this relatively centralized kingdom established by King Agaja of Dahomey (1708-1740), the slave trade had been developed as a monopoly by King Kpengla (1774-1789). It was fed by periodic razzias on the borders of the kingdom, which benefited the Fon ethnic group. Ouidah, isolated from the rest of the kingdom, was placed under the control of a great dignitary, the *Yovoghan* (which means 'chief of the whites'), who played the role of commercial intermediary between European slave traders and the Kingdom of Danxomè (called Dahomey by the European colonizers). The captives were grouped together in a square to be sold, then, in chains, they walked the few kilometres to the beach where they were held in barracoons before boarding small boats that took them to slave ships leaving for the Caribbean and the Americas. On this stretch of the Atlantic coast, the Portuguese fort in Ouidah was, with the exception of some sites in Ghana, the only large-scale facility used for loading captives onto ships heading to the Americas. Built in 1721 by the Portuguese and called the Fort of São João Baptista de Ajudá, this site was used as a warehouse for captives until 1816, then as a Catholic mission until 1893 and, lastly, as a seat for representation of the Portuguese state from 1894 to 1961. After the departure of the Portuguese in 1961, it underwent renovation work beginning in 1964 before officially becoming Ouidah Museum of History on 6 September 1967. The colonial buildings in Ouidah are registered on Benin's National Heritage List, as are the sites associated with the slave trade, which are also on the UNESCO Tentative World Heritage List.

■ DESCRIPTION

The Ouidah Museum of History stands on approximately one hectare of land and includes a main building, annex buildings, a craft centre, a main courtyard planted with mango trees, an ornamental garden and a sylvan theatre that hosts musical performances and various cultural events.

In the exhibition rooms, the collections are organized around five themes:

< the history of the Kingdoms of Xwéda and Da as well as the arrival of Europeans in the Gulf of Guinea

- the lives of African captives in the New World
- the influence of culture from Benin on the societies of the New World through the theme of the religious syncretism arising from the encounter of African cultures and spiritualities with European cultures
- the culture of emancipated slaves who returned to the country
- the cultural and spiritual life of local populations, illustrated through a number of cultural objects and photographs of ceremonies.

In addition, temporary exhibitions are organized about objects discovered during archaeological digs and about Afro-Brazilian culture, slavery, the history of Dahomey and the family heritage of Ouidah.

In the main building, there is also a shop, a documentation centre and a multi-purpose room for use by visitors to the museum. The museum attracts varied audiences made up of researchers, documentary film-makers, students of all ages and international tourists from the Americas and Europe. It attaches particular importance to its educational and pedagogical role.

The site also conducts a variety of promotional activities using communication tools (such as posters, calendars, brochures and websites), cultural events (such as International Museum Day, Christmas at the museum), religious events (e.g. festival of Saint John the Baptist, the patron saint of the Fort, and the Feast of the Immaculate Conception), and disseminates reports on sites linked to the slave trade and adverts about museum-related events.

The Ouidah Museum of History is part of Benin's network of national museums, which stretches from Porto Novo to Natitingou.

The sites in Ouidah associated with the slave trade and slavery, including the History Museum, benefit from a conservation and management plan, which was drawn up in 2004 as part of the Africa 2009 programme led by the School of African Heritage (EPA) and has begun to be implemented. The annual budget comes from the museum's own revenue and funding from the state of Benin. The museum is run by a team of nine people: a curator, a secretary, two guides, a receptionist, a caretaker, an electrician and two museum attendants.

Other associated sites include:

- The Door of No Return in memory of the period of slavery
- A variety of sculptures marking the former path used by slaves
- The Sacred Forest of Kpasse
- The Vodun Temple of the Python

The museum's main partners contribute by providing funding or technical assistance: the Friends of the Ouidah Museum of History Association; the College of William and Mary, Virginia, United States; the School of African Heritage (EPA); the Calouste Gulbenkian Foundation; the House of memory (Maison de la Mémoire) in Ouidah; Palmira Municipal Museum in Cienfuegos, Cuba; the Rotary Club; the National University of Benin; and the West African Museum Program (WAMP).

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House of Slaves, Gorée, Senegal
© Richard Veillon/ UNESCO

Fact Sheet 9: The House of Slaves, Island of Gorée, Senegal

United Nations Educational, Scientific and Cultural Organization
Organisation des Nations Unies pour l'éducation, la science et la culture
World Heritage Convention
Convention du patrimoine mondial

■ BACKGROUND

The Island of Gorée has a surface area of 28 hectares and lies 3.5 kilometres off the coast from Dakar. Its history is interwoven with that of the transatlantic slave trade. For three centuries, African captives were shipped from the Island of Gorée to the Americas. The physical legacy of this history is made up of buildings, military fortifications and places of captivity.

The Portuguese navigator, Dinis Dias, reached the Island of Gorée, which he named Palma, in 1444. The Dutch captured Gorée in 1588 and renamed it *Goede Reede* (good haven). Then the French gained control of the island on 1 November 1677, although this position was challenged by the British until the signing of the Treaty of Amiens in 1802. The island was occupied by the British from 1804 to 1817 and then again by the French. Until the abolition of slavery in the French colonies in 1848, the island served as a warehouse consisting of over a dozen slave houses.

■ DESCRIPTION

This 'memory island' has a remarkable architectural heritage.

The Island of Gorée is infamous for its slave prisons. The House of Slaves is one such example. It may have been the last active slave quarters on Gorée. The first such house dates back to 1536 and was built by the Portuguese, the first Europeans to step foot on the island in 1444. On the ground floor of the House of Slaves, there are cells on whose pediments can be read 'men', 'children', 'weighing room', 'girls' and 'temporarily inapt'. Up to 15 or 20 people were kept in the cells reserved for men, seated with their backs against the wall, with chains around their necks and arms. The number of captives confined in this small house would have varied from 150 to 200. In dark, damp cellars, or torture cells for any who rebelled, the deportees would languish for weeks, awaiting the voyage from which there could be no return. Sometimes this wait would last almost three months. During embarkation, each slave was branded with the mark of his or her owner. Then the slaves were crowded into the holds, where many were doomed to perish before they reached their destination.

Gorée is protected by an arsenal of legal texts. The Island of Gorée was designated a historic site in 1944, with safeguarding measures being introduced in 1951 (in the colonial era). It was subsequently inscribed on the national heritage list in 1975 (Order No. 012771 of 17 November 1975) and on the UNESCO World Heritage List in 1978.

The strong tourism appeal of Gorée prompted the development of accommodation, a sociocultural centre, a community clinic, a maternity clinic, an artisanal and commercial market, and restaurants. Several other museums have also been created, such as the Henriette-Bathily Women's Museum, the History Museum and the Museum of the Sea. They present temporary exhibitions related to slavery and its contemporary implications.

The island is an obligatory stop for all visitors to Senegal. Pope Jean-Paul II and heads of state such as George Bush, Bill Clinton and Nelson Mandela have used Gorée as a forum to deliver messages to the world. Visitors are diverse and include local residents, school groups, historians, researchers, PhD students, and other students (for coursework that complements their formal education). Cruise ships arrange excursions to the island, and summer youth camps have set up residence there.

The attractiveness of Gorée is also enhanced through national heritage days, the Gorée Diaspora Festival (performing arts), performances in cultural spaces (e.g. sound and light shows), music concerts, celebrations on Independence Day (4 April), commemoration of the abolition of slavery (27 April), parish celebrations for Saint Charles Borromée and various conferences.

While the annual budget and funding to manage the site are provided through the Senegalese Ministry of Culture (Directorate for Cultural Heritage), the site of Gorée also benefits from the support of numerous partners:

1. **African and international organizations:** Municipal Development Agency/Agence d'exécution des travaux d'intérêt public contre le sous-emploi (AGETIP) (a Senegalese public works and employment agency) for restoring the health centre, the sociocultural centre and the city hall; World Bank; International Coalition of Sites of Conscience; School of African Heritage (EPA), Porto-Novo, Benin; Ford Foundation (funding to restore the House of Slaves); and the African World Heritage Fund of UNESCO. Gorée is also a member of the Network of World Heritage Site of Portuguese Origin and Influence.
2. **National institutions:** Directorate for Cultural Heritage, Ministry of Culture and Tourism and the Gorée Tourist Office.
3. **Local institutions**: association of artists and musicians, faith-based organizations, students' association, Gorée women's association, association of local guides, association of merchants and artisans, municipality of Gorée and the Gorée Institute.
4. **Research centres, universities and elementary and secondary schools:** UNESCO Associated Schools, Fundamental Institute for Black Africa (IFAN), Lycée d'excellence Mariama Bâ, and Cheikh Anta Diop University in Dakar.

5. **Private stakeholders** (e.g. companies, foundations and individuals)**:** AGETIP, Aid Transparency Senegal, Eiffage Sénégal, Entreprise de travaux modernes (ETM), Entreprise Modou Gueye, and the Port Authority of Dakar (Port autonome de Dakar) providing a Dakar-Gorée maritime connection.
6. **Collaborations with other memorial sites/itineraries and monuments**: Island of Saint- Louis, sites in South Africa, Benin, Cape Verde and Ghana.

From the first International Festival of Negro Arts, which took place 1-24 April 1966 in Dakar, Senegal, for which the Gorée House of Slaves was restored, to the Gorée Diaspora Festival, which was first held in 2005, international cultural events have supported the promotion of the island's heritage, the dissemination of an iconic image and the consolidation of strong values around this place.

Today, the Island of Gorée is a symbolic place, emblematic of the slave trade and slavery. In the second half of the 20th century, it was one of the first historic sites associated with the slave trade and slavery for which a real effort was made to develop its heritage and attract international tourists.

It is now viewed as a place of pilgrimage by many people of African descent exploring their roots and by anyone wishing to draw from this painful history reasons for a new solidarity between different peoples.

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Island of Gorée is listed as a UNESCO World Heritage Site: http://whc.unesco.org/en/list/26/



St. George Castle, Ghana
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Fact Sheet 10: Elmina Castle, Ghana

United Nations Educational, Scientific and Cultural Organization · Organisation des Nations Unies pour l'éducation, la science et la culture · World Heritage Convention · Convention du patrimoine mondial

■ BACKGROUND

The castles and forts of Ghana shaped not only Ghana's history but that of the world for four centuries, during which the country was at the heart of first the gold trade and then the slave trade. Elmina Castle, which was built by the Portuguese in 1482, is one of the oldest European buildings outside Europe, and the historic town of Elmina is believed to be the location of the first point of contact between Europeans and sub-Saharan Africans.

Elmina Castle was central to the transatlantic slave trade, as millions of captives were held there before being shipped across the Atlantic.

It was one of the most important slave-trading posts on this stretch of coastal West Africa, on the shores of present-day Ghana. After receiving King Nana Kwamena Ansa's authorization to build the fort, which bears the name of the patron saint of Portugal (Saint George), King John II placed Elmina Castle under the command of Diogo d'Azambuja.

■ DESCRIPTION

Elmina Castle is one of the major tourist sites in Ghana. It currently houses the regional headquarters of the Ghana Museums and Monuments Board. Since 1969, the site has benefited from the status of scientific research body, following a decision by the National Liberation Council for the protection, conservation and management of the tangible cultural heritage in Ghana for posterity, research and educational purposes. The aim of the Council was to foster national identity and unity and to have the country benefit from economic and social advantages generated through tourist activity managed jointly by the government and tourism agencies.

Housed in Elmina Castle, the museum was established in 1996 by the joint efforts of the Ghana Museums and Monuments Board (GMMB), the United States Agency for International Development and the Midwest Universities Consortium for International Activities. Its objective is to educate the public about the history of this fort and to preserve the region's cultural heritage. It offers guided visits of the Castle.

The fort, whose funding comes from admission fees, rent, donations and subsidies, is open seven days a week to all visitors. They can visit warehouses, dungeons for captives, an auction room, a tunnel that served as a passageway for slaves, a Christian church and the governor's residence. Various objects including cannons, mortars and cannonballs are also on display.

In addition, the museum offers various services and organizes events, such as cultural and artistic performances, exhibitions, thematic presentations with reconstructions, a library, video room, souvenir shop, bar and restaurant.

Each year, the site receives between 75,000 and 90,000 visitors, both local and regional, made up of school groups and students (20%), researchers, eminent figures, media and international tourists (20-25%). The site is also frequented by young people, who account for 45% of all visitors. Some youth work at the site as volunteers or as part of their national civic service.

The site is promoted through a variety of channels, including a website, radio, television (reports) and participation in various celebrations (e.g. International Museum Day, Emancipation Day and year-end festivities).

Furthermore, the Castle hosts the annual Pan African Historical Theatre Festival (PANAFEST), which was started in the mid-1980s as a way of bringing together Africans from the content and the diaspora around crucial questions raised by the history of the slave trade and slavery.

Elmina Castle is part of a series of monuments collectively inscribed on the UNESCO World Heritage List in 1979 under the name 'Forts and Castles, Volta, Greater Accra, Central and Western Regions'. Along the coast of Ghana, between Keta and Beyin, these fortified trading posts, founded between 1482 and 1786, are the remains of the trade routes established by the Portuguese around the world during their era of great maritime exploration.

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http://www.panafestghana.org/index. php

The Forts and Castles, Volta, Greater Accra, Central and Western Regions are listed as a UNESCO World Heritage Site: http://whc.unesco.org/en/list/34/



Detail of the Slavery Memorial Garden, Mozambique
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Fact Sheet 11: Slavery Memorial Garden, Mozambique Island, Mozambique

United Nations Educational, Scientific and Cultural Organization · World Heritage Convention
Organisation des Nations Unies pour l'éducation, la science et la culture · Convention du patrimoine mondial

■ BACKGROUND

From the early 16th century, Mozambique Island was a strategic port of call on the sea route from Lisbon in Portugal to Goa in India. In 1558, construction began on the Fortress of St. Sebastian, which became a warehouse for slaves and goods (African wood and ivory, gold, Indian fabrics) traded between the continents. The island was also the point of departure for trading expeditions to Inhambane, Lourenço Marques, Sofala and Quelimane. Other nations besides Portugal controlled those sea routes. The English were establishing themselves as master seafarers and the French as middlemen in the slave trade to the Indian Ocean islands, while the Dutch were seeking to occupy the island. Thus, in 1752, Portugal established a captaincy on Mozambique Island (*Capitania Geral do Estado do Moçambique*) to manage the Ibo slave trade to Brazil.

Mozambique Island played an important role in the slave trade until the 19th century as the port of embarkation for thousands of slaves bound for various destinations. It had the largest urban warehouse in East Africa and was a hub of human movement (slaves, seafarers, slave traders, etc.). It still bears the traces of the various cultures and peoples that have passed through it.

It was included in the UNESCO World Heritage List in 1991. The island still shows many signs of the development of Portuguese sea routes between Western Europe and the Indian subcontinent and from there to all of Asia. The island's town and fortifications, as well as the Island of St Lawrence, boast exceptional examples of an architecture blending local traditions, and Portuguese, Indian and Arab influences.

■ DESCRIPTION

The Slavery Memorial Garden was created as part of UNESCO's Slave Route Project at the instance of Sudel Fuma (1952-2014), a historian and then holder of the UNESCO Chair at the Université de la Réunion. It was inaugurated on the International Day for the Remembrance of the Slave Trade and its Abolition, on 23 August 2007. Funded by the Mozambique Ministry of Culture, the Association HISTORUN in Réunion, the French Embassy in Mozambique, the Réunion Regional Council and UNESCO, the garden is managed by the Mozambique Island Conservation Office (GACIM).

The garden is structured in three rings, each representing a function: festive and seductive dances involving the whole community; initiation dances for certain age groups as rites of passage; and trance dances, expressing the most intimate human feelings. The garden consists of three separate areas:

1. **The first circle**: the circle at its centre recalls the circle of the traditional Réunion battle dance (moring). Four metal stelae are engraved (in Portuguese, Makua, French and English) with information on the history of the island and the slave trade.
2. **The second circle**: a place of history and initiation, measuring twelve metres in diameter and ringed by twelve busts created by sculptors from Mozambique and Réunion. In the middle of the alley is an area marked by two concrete borders connected at each end by a piece of ebony. The whole of this area is densely planted (fruit trees, shrubs, plants, etc.) and crossed by a path. The line of the alley and the positioning of the sculptures and rock fragments interact to convey the idea that while we look at the past the future is looking at us.
3. **The third circle**: this circle is crossed by an alley that runs beside the sea and leads to the far end of the enclosure. A 4-metre circle is marked on the ground and 12 small blocks are positioned on it to indicate the points of the compass and form a clock face. In its centre is a stone bench facing the 'empty space' of sea and sky, inviting the visitor to reflect.

The garden is a public area frequented by schoolchildren, local residents, hawkers and tourists.

Inaugurated in 2007, the garden has remained in an overall good state, despite the difficult climatic conditions. However, it has deteriorated slightly due to the alternation of periods of several months of very dry weather and occasional heavy rains. In 2015, work on the garden was begun in cooperation with the island's Conservation Office, with funding from private sponsors (the companies Oceinde and Labo Pix) and the Réunion Regional Council.

The originality of the concept lies in the creation of a commemorative garden. Indeed, it needs to be nurtured, as does memory, and has been designed as a living, collective space that evolves as the plants grow. The designer was keen to avoid making it an institutional place, like a museum. The garden was planned as a free, open space so that the island's residents can enter it spontaneously and connect with it.

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Mozambique Island is listed as a UNESCO World Heritage Site: http://whc.unesco.org/en/list/599/



Cidade Velha, Historic Centre, Ribeira Grande, Cabo Verde
© Shutterstock.com / Salvador Aznar

Fact Sheet 12: Historic Centre of Ribeira Grande de Santiago, Cidade Velha, Cabo Verde

United Nations Educational, Scientific and Cultural Organization · World Heritage Convention
Organisation des Nations Unies pour l'éducation, la science et la culture · Convention du patrimoine mondial

■ BACKGROUND

The islands of Cape Verde were discovered in 1460, 17 years after the first Africans captured on the coast of Mauritania were taken to Portugal. Portuguese traders soon transformed the site into a large open-air warehouse for slaves, the first of its kind in the world. Cidade Velha was the first colonial town to be built by Europeans in sub-Saharan Africa and was entirely dependent on the economy of the slave trade. It was also the site that led to the gradual population of the whole archipelago.

The foundation of Ribeira Grande/Cidade Velha marks a decisive step in European expansion in the late 15th century towards Africa and the Atlantic area. Subsequently, in the 16th and 17th centuries, Ribeira Grande was a key port of call for Portuguese colonization and its administration. It was an exceptional crossroads for international maritime trade, lying on the routes between Africa and the Cape, Brazil and the Caribbean. It provides an early image of transcontinental geopolitical visions. Its island location, isolated but close to the coast of Africa, made it an essential platform for the Atlantic slave trade in modern times. A place of concentration of enslaved persons and the inhuman practices of the slave trade, Ribeira Grande was also exceptional in terms of the intercultural encounters from which stemmed the first Creole society. The valley of Ribeira Grande experimented with new forms of colonial agriculture on the boundary between the temperate and tropical climates. It became a platform for the acclimatisation and dissemination of plant species across the world.

The site was added to the World Heritage List in June 2009. A management plan is in place to improve conservation of the site, which is managed in a participatory manner by the central government (Ministry of Culture), the local government (Municipality of Ribeira Grande de Santiago) and local organizations (civil society, business owners, fishing and farming associations, cultural associations, sports associations, etc.).

■ DESCRIPTION

Cidade Velha illustrates the first phase of the development of the slave trade. Between 1450 and 1640, the Portuguese had a monopoly over this trade, and Cidade Velha was at the heart of the system from 1460 onwards. Another unique feature of Cidade Velha/Ribeira Grande is the continuity of political control, which did not leave Portuguese hands, unlike other known sites of the slave trade such as Elmina (Portuguese 1482, Dutch 1637, British 1872), Gorée (Dutch 1627, French 1677, British 1758, French 1763), James Island (Latvian 1651, British 1661, French 1695, then regularly changed hands between the French and British). Cape Verde stands out for the great diversity of origin of the slaves who landed there, which led to the emergence of a very rich new culture: the Creole culture. Creole results from the need to invent a new language and new forms of cultural expression, and to create bonds between cultural groups that knew very little about each other.

Cidade Velha is no longer the dynamic port of the 16th and 17th centuries, or the platform for the exchange and storage of goods and information between slave traffickers, traders and Portuguese administrators. Nor is it any longer a strategic military and religious site, or a plant acclimatisation laboratory. However, the town on Ribeira Grande bay is still alive. Traces of bygone practices and functions remain in the landscape. The diversity of plants introduced to Ribeira Grande is still present in the crops grown in the valley. Cultural expressions are still active, reflecting the town's European and African roots.

The state of conservation of the monuments is very good, with considerable resources having been invested in recent years to safeguard them, mainly thanks to Spanish cooperation. The roof of the São Francisco chapel has been rebuilt and the space now hosts a range of cultural events. These restoration campaigns have generated a conservation dynamic that is gradually extending to private dwellings. In addition, work on the monuments has led to the training of a number of craftspersons and a revival of traditional skills. Besides these recent interventions, it should be remembered that work had already been undertaken in the 1960s to mark the 500th anniversary of the discovery of the archipelago. That work involved reconstruction of the perimeter wall of the Royal Fort of São Filipe and repairs to the rendering on the churches of Nossa Senhora do Rosário and São Roque. Not all the monuments have been restored, however. Some have been kept in their current condition, such as the cathedral, the ruins of which were cleaned and stabilized in 2004 with the support of Portuguese cooperation. Only a few sections of the walls were rebuilt to give a clearer idea of the volume of the former structure. The cathedral has lost both its roof and its north-east transept. The openings and the bases of the pillars at the crossing of the transept are still identifiable. This stabilized ruin is a good illustration of the town's eventful history. Archaeological digs have been carried out in the cathedral and at other sites of archaeological interest and additional initiatives are planned to renovate other monuments and undertake future archaeological interventions. These digs are carried out in collaboration with national and international archaeologists. Jean Piaget University in Praia works with the University of Cambridge and the British Museum on archaeological research in Cidade Velha and each year also trains architecture students.

Underwater excavations have revealed a large number of wrecks just off the shore, serving as a reminder of the greed and the dramas that unfolded in the bay. The excavations have uncovered objects of worship, coral beads, bronze items and other objects. This heritage will steadily shed more light on the history of the site.

Life in Cidade Velha and the archipelago in general was structured around social practices, rituals and festive events, customary activities valued and practised by the whole population, like their common Creole language. One example of this is the syncretic religious events held during popular festivities for patron saints linked to the toponymy (Saint James, Saint John, Saint Anthony, Saint Philip, Saint Catherine, etc.). These cultural expressions are some of the links that connect the site and the archipelago to communities and groups associated with the Atlantic slave trade. The people of Cape Verde have built a body of knowledge, skills, representations and practices that have been developed and passed down through the ages in interaction with the natural environment. These practices constitute one of the strongest cultural bonds of the archipelago. Manifestations of local creative crafts include clothing, ornaments, performing arts, objects used to transport and store agricultural produce and consumables, or for their processing and consumption, objects linked to domestic utensils and musical instruments.

The different African cultures that shaped the Creole culture are deeply rooted in Cape Verde's cultural life, in music and dance, but also in the Creole language and culinary tradition. All these components of Cape Verdean culture are found in Cidade Velha.

An average of 30,000 tourists visit Cidade Velha each year. However, it is very difficult to measure the number of national tourists, especially at weekends and during the summer, and the number of schoolchildren and students who come on study visits. The most optimistic estimates of 80,000 annual tourism visits to Cidade Velha, which has a resident population of 3,500 inhabitants, would represent huge human pressure on the site. Yet, the financial revenue for local businesses, the local population, the municipality and the government is extremely low.

Management of the tourist circuit is delegated to a private agency (Proim-Tur), which collects the fees for entry to the fort and manages maintenance of the monuments. The monument management staff (24 employees) are paid by Proim-Tur from the fees paid by the tourists to enter the fort. Part of the revenue from the tourist circuit management contract concluded with the managing company Proim-Tur will be reinvested in management and conservation of the site. The government's decision to entrust management of the Integrated Tourist Circuit to a private company was based on the fact that the Cultural Heritage Institute's remit does not cover handling the economic management of a tourist circuit which includes a hostel, among other things. Taking into account the unique characteristics of the historic site in the country, the aim is to ensure that the tourism offering delivers a good quality service with the cultural dimension at its heart.

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The Historic Centre of Ribeira Grande de Santiago is listed as a UNESCO World Heritage Site : http://whc.unesco.org/en/list/1310/



Aerial view of Citadelle Laferrière, Haiti
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Fact Sheet 13: Citadelle Laferrière, Haiti

United Nations Educational, Scientific and Cultural Organization
Organisation des Nations Unies pour l'éducation, la science et la culture
World Heritage Convention
Convention du patrimoine mondial

■ BACKGROUND

On the eve of the French Revolution in 1789, the former French colony of Saint-Domingue had over 8,500 businesses (coffee plantations, sugar mills, indigo mills, etc.) employing more than 500,000 slaves. The slave uprising in Saint-Domingue on 22 and 23 August 1791 forced the French authorities to proclaim the liberation of the slaves in 1793, the abolition of slavery being confirmed by the National Convention on 4 February 1794. Toussaint Louverture, the former slave who had become general-in-chief of the Saint-Domingue army, promulgated a constitution in 1801 as governor of the colony. Napoleon Bonaparte then decided to send a military expedition under the command of General Leclerc, which arrived on the island in January 1802. Its task was to restore slavery and the French colonial system in line with pre-1789 legislation. Toussaint Louverture was taken prisoner by Leclerc and transported to the Fort de Joux in the Jura Mountains, where he died in April 1803. Following a colonial war that left tens of thousands dead, the French troops were defeated at the Battle of Vertières in November 1803. On 1 January 1804, in Les Gonaïves, Jean-Jacques Dessalines proclaimed the independence of Saint-Domingue, under its original Taíno name of Haiti. This first independent black republic predominantly populated by former slaves was led by Dessalines, Emperor of Haiti, and subsequently by Henri Christophe, King of Haiti, in the north and by Jean-Pierre Boyer, President of Haiti, in the south.

Between 1804 and 1820, fearing an attempt by the French to re-colonize the island and restore slavery, the new authorities built numerous fortresses. The most symbolic and most imposing in the whole Caribbean was Citadelle Laferrière, built near the town of Milot in the north of the island, which took some 20,000 men and around 15 years to build, with 2,000 of them dying in the process. According to local guides, it is 'blood mixed with mortar' that explains the strength of the fort, which was nevertheless partly destroyed by the 1842 earthquake.

The National History Park (Citadel, Sans-Souci, Ramiers) has been on UNESCO's World Heritage List since 1982. Reconstruction work by the Haitian Institute for the Protection of National Heritage (ISPAN) made it possible to save the basic features. A plaque was laid in 1990 to remind visitors that King Henri I, faced with an uprising, committed suicide at Sans-Souci Palace on 8 October 1820. He was buried in this, his, citadel, which has become a powerful patriotic symbol.

■ DESCRIPTION

In 1932, under the government of Sténio Vincent (1930-1941), initial work began on 'repairing and rehabilitating' historical monuments in Haiti, including Citadelle Laferrière. Under President Paul-Eugène Magloire (1950-1956), the preservation and improvement programme continued with work to reinforce the citadel and the Sans-Souci Palace. After an interruption of some ten years, this effort resumed in the 1970s, which also saw a revival in tourism after the instability and upheavals of the 1960s. This was when the Haitian National Institute for the Protection of National Heritage (ISPAN) was set up, taking over from the Historical Monument Conservation Department the preservation work on Citadelle Laferrière and the Sans-Souci Palace.

A list of the citadel's attractions was drawn up and an ambitious tourist trail established. Guided tours are conducted in groups of 20, lasting one to two hours. They cover the monument's history (including its defence system) and the life of its builder, Henri Christophe. Various visitor facilities are available: a projection room for screening documentaries; a heritage interpretation centre; exhibition rooms for weapons, heavy artillery pieces from the late 18th century, and tools used to build the fortress; a souvenir shop; a cafeteria; and a reception desk and tourist information office.

The development plan also incorporates other functions, such as restoration workshops, storehouses, accommodation for administrative and maintenance staff and technical rooms. This plan is an initial phase. The Royal Battery Gallery and the Rotonde are currently undergoing restoration and are therefore closed to visitors. Other parts of the monument that ISPAN and UNESCO experts consider to be unstable, or even unsafe, will be included in a supplementary development plan once they have been stabilized and restored. In addition, from April 2013, with funds from the Haitian Treasury made available through the Ministry of Tourism, ISPAN began work on a number of projects simultaneously, some of which have now been completed:

1. Artillery Museum

Citadelle Laferrière has the largest collection of 18-century ordnance in the world, with over 163 pieces of artillery. Some of the bronze cannons from Spain, France, Italy and Britain are true masterpieces. About a dozen are still on their original heavy timber carriages - the only such examples in the world.

2. Albert Mangonès Room

Designed to accommodate an audience of 50, it is equipped with an audiovisual system for lectures and continuous viewing of documentaries.

3. Heritage Interpretation Centre

With its cultural and educational role, the centre will have a permanent exhibition to inform and educate a wide range of visitors - both local residents and tourists from farther afield - about the architecture, construction, history and restoration of the citadel.

4. The English Rooms

These rooms will be open to the public once the walls and vaults have been renovated, the flooring has been restored and the English cannons captured from the enemy in Toussaint Louverture's time have been restored or replicated.

5. Viewing platforms

To complete the tourism development of the citadel, three landscape viewing points are planned: the Marie-Louise Battery, the Drawbridge Bastion terrace and the Princesses' Battery terrace.

In addition to this development plan, visitor facilities (accommodation, catering, etc.) will be provided, taking care to ensure that the preservation of historical heritage forms an integral part of a flourishing tourist economy.

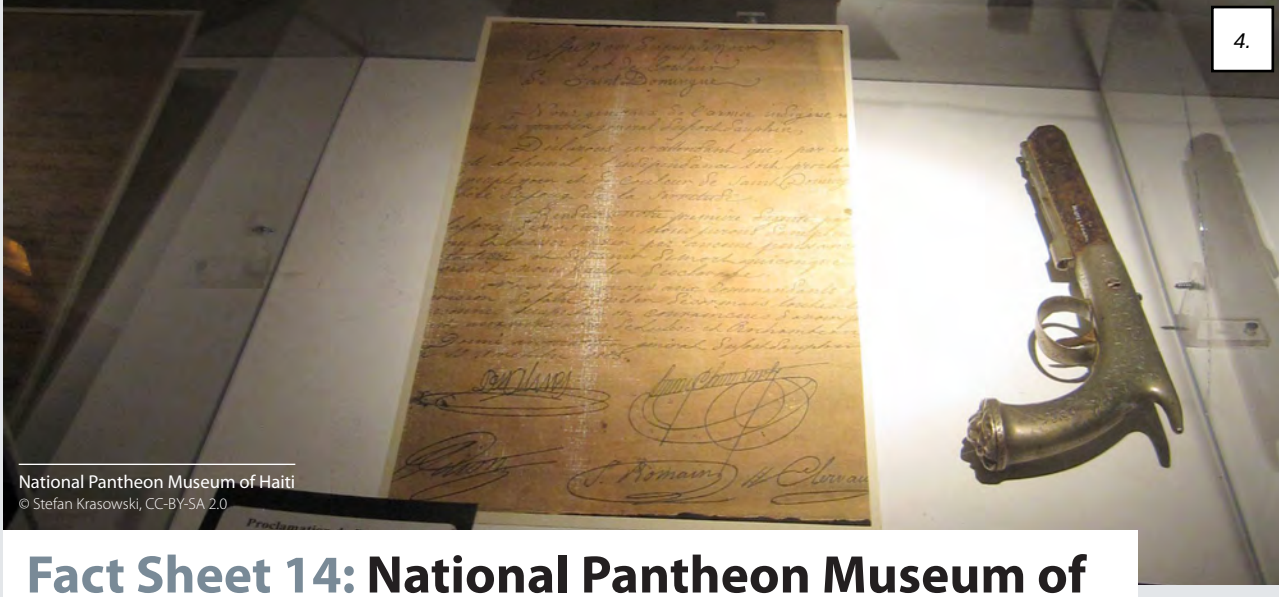
These extensive works, which lasted 13 years and were the first phase in restoring Haiti's historical heritage, were completed in 1993 and carried out with technical assistance from UNESCO and funding from UNDP and the Haitian Treasury.

Also, in partnership with UNESCO, ISPAN has marked out the boundaries of the National History Park (25 square kilometres). In 2010, in national partnership with the Haitian Ministry of Tourism and the National Pantheon Museum of Haiti (MUPANAH), ISPAN published a tourism development plan for Citadelle Laferrière, which has been eagerly awaited since completion of the first phase of restoration work, which mainly involved protecting the famous monument from water damage.

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The National History Park – Citadel, Sans-Souci, Ramiers is listed as a UNESCO World Heritage Site: http://whc.unesco.org/en/list/180/



National Pantheon Museum of Haiti
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Fact Sheet 14: National Pantheon Museum of Haiti (MUPANAH), Haiti

■ BACKGROUND

The independence of Haiti, proclaimed on 1 January 1804, was a first in world history: the first successful slave uprising, the first emancipation of an indigenous colony, and the first black republic. Henri Christophe, Jean-Jacques Dessalines, Toussaint Louverture and Alexandre Pétion were the founders of this new republic, and occupy an omnipresent place in the collective national memory.

Construction of the building that houses the National Pantheon Museum of Haiti began in 1973 on the Place des Héros de l'Indépendance, on the Champ de Mars, Port-au-Prince.

It was opened as the Mausoleum of the Founding Fathers on 18 May 1975 and then given a new vocation by the decree of 20 October 1982 creating the National Pantheon Museum of Haiti (MUPANAH). Inaugurated on 7 April 1983, it is Haiti's only public museum dedicated to history.

As part of its remit to publicize and perpetuate the memory of the founding fathers, MUPANAH is helping preserve cultural heritage and promote national culture.

■ DESCRIPTION

The museum houses a pantheon, which carefully preserves the remains of the founding fathers Henry Christophe, Jean-Jacques Dessalines, Toussaint Louverture and Alexandre Pétion.

It also has two exhibition rooms. The first, which holds the museum's permanent collection, contains historical records and exhibits from the pre-Columbian era up to the present day, via the revolutionary period during which the indigenous army fought against the colonial system to create the world's first independent black state: Haiti.

The second room, commonly known as the art gallery, accommodates temporary exhibitions, which may be either artistic or historical. The museum also has a conference room.

The museum's collection includes archaeological and ethnographic items such as artefacts from the Spanish and French colonial periods, including the anchor of the *Santa Maria,* slave irons dating from the 17th century, rifles with fixed bayonets used by officers of the indigenous army and Taíno objects. In addition, its art collection includes works by the great masters of Haitian painting from 1944 to the present. It is also rich in sculptures.

The National Pantheon Museum of Haiti offers guided tours, seven days a week, for a variety of visitors: adults, school children, young people, professionals and tourists.

It had 42,200 visitors in 2011/2012: 26,000 schoolchildren, accounting for 62% of visitors (every year the museum receives over a thousand school parties from all over the country); 8,800 students (21%); and 3,400 foreign tourists (8%).

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Ogier-Fombrun Museum, Montrouis, Haiti
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Fact Sheet 15: Ogier-Fombrun Museum, Montrouis, Haiti

■ BACKGROUND

As in all the Caribbean territories, whether French-, English- or Spanish-speaking, the majority of slaves lived, worked and died on large plantations, also known as *habitations* in the French colonies, during the period of colonial occupation of Saint-Domingue/Haiti. There were plantations producing sugar, coffee, indigo and cotton, as well as distilleries, communal farming plots, limekilns and tileworks. These places have become slavery memorial sites; for Haiti, their vestiges represent an important architectural heritage that bears witness to the slave system and the plantation economy based on the extreme exploitation of enslaved men, women and children.

The Ogier-Fombrun Museum is located in Montrouis, Haiti, on the site of a former plantation dating from the 18th century. The region of Montrouis, a coastal town 70 km from Port-au-Prince, offered ideal land for the cultivation of sugar cane, the manufacture of sugar and its export to France given its proximity to Saint-Marc, one of the most active ports of Saint-Domingue. Built in 1760 by the colonist from Bordeaux, Guillaume Ogier, the Ogier plantation had one of the main sugar mills in the region until 1791, the year of the general slave uprising. The plantation was abandoned in 1799 during the revolutionary period.

The architect Gérard Fombrun purchased the ruins of the plantation in March 1977 and immediately began renovation work, motivated by a desire to contribute to preserving Haiti's national heritage. Once completed, he decided to turn it into a museum documenting the country's history from the pre-Colombian period, through the Spanish and French colonial periods, up to the creation of the Haitian nation in 1804.

■ DESCRIPTION

The Ogier-Fombrun Museum exhibits various objects used in the production of sugar, such as boilers, tools and whetstones. It has a 150-metre-long aqueduct with its paddle wheel, which powered the sugar mill and has been restored to working condition. An animal-powered mill and an oven for drying sugar loaves have also been preserved on the site. The museum was built on the ruins of the foundations of the old sugar mill, and stones found on the site were used to reconstruct the walls.

A model of the plantation, based on studies conducted at the National Overseas Archives in France by heritage conservation students under the direction of the historian Michel Philippe Lerebours, is displayed in the museum. Authentic objects linked to slavery, such as chains, irons, a guillotine blade and even a slave trap, are part of the permanent exhibition. In addition, the life of the colonists on the plantation is portrayed through a large collection of furniture from the period. Sabres, swords, firearms, cannons, and hats and stripes used by the leaders and generals of the War of Independence are also exhibited to illustrate the revolutionary period.

In the gardens, a sculptural installation designed by Gérard Fombrun, the 'Cortège Macabre', represents the ordeal of slaves chained by the neck and harnessed to an old wooden cart. This cart, found in Léogâne, not far from Port-au-Prince, was donated to the museum and is believed to date from the colonial era.

The museum's collection of authentic objects and documents is presented according to three main themes:

- it explains the architecture and functioning of the sugar plantation in the colony of Saint-Domingue;
- it recounts the origins of the Haitian nation and identifies the three cultures that make up the identity of the Haitian people, namely the pre-Colombian, African and European cultures;
- it describes the history of slavery, the role played by the rebellion of the slaves on Saint-Domingue in the abolition of slavery in general, and Haiti's independence from France.

Recently renovated, the Ogier-Fombrun Museum has positioned itself in the cultural, tourism and educational sector with a renewed vision for fostering the development of the Montrouis region and the country as a whole. The renovation work had three main objectives:

1. Strengthen the museum's educational role
2 Integrate the museum into the tourism sector
3. Develop, around heritage, the notion of 'living together and pulling together'.

The Ogier-Fombrun Museum currently receives an average of 2,700 visitors a year. Given its vocation as an educational site of memory, it targets a diverse audience and works to strengthen these three focus areas.

The museum has implemented various strategies, projects and actions with the aim of facilitating the dissemination of history to various audiences, through both education and tourism. Here are some examples:

- Hiring and training local guides in order to foster the appropriation of history by people from the region and establish a better rapport with young visitors.
- Workshops on teaching history for local teachers and an initial visit to the museum before taking their pupils there.
- Training teachers in partnership with the mental health organization Rebâti Santé Mentale.
- Exercises for young people on the interactive whiteboard to stimulate their participation during the visit (in partnership with Haïti Futur).
- Theatre performances, discussion sessions, film screenings, etc.

- The creation of a history research centre in partnership with the French Shackles of memory Association and the Sugar Cane Historic Park.
- Participation in the Schools of the World on the Slave Route project, the Haiti Legacy Project and its website.

To guarantee the sustainability of the museum and its collection, which to date have been entirely maintained by Gérard Fombrun, a foundation called Fondation Moulin Sur Mer has been set up. This foundation, which also has the objective of creating social projects for the development of the Montrouis region, is responsible for the survival of the Ogier-Fombrun Museum and is primarily financed by the Moulin Sur Mer Hotel, which contributes a percentage of its turnover, and one-off donations from individuals and businesses. Partnerships have been established with different actors in the tourism sector to create circuits and networks, encouraging the local population to embrace this idea of showcasing heritage and presenting it in a lively and unbiased manner.

As there were seven other similar plantations in the region that have since disappeared, Gérard Fombrun's work constitutes an important contribution to the effort to preserve Haitian heritage. Opened to the public in 1993, the Ogier-Fombrun Museum is a vast depository of the history and memory of slavery in Haiti.

At the museum, the history of slavery is presented and recounted to children - who are the museum's main audience - through the objects on display, encouraging learning and imagination. To mitigate the difficult feelings raised by exploring this history, the emphasis during visits is on the uniqueness of Haiti's history, the history of the struggles by Haitians for the abolition of slavery and the independence of Haiti, making it the world's first black republic and paving the way for several other peoples to obtain their freedom.

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Victor Schoelcher Museum, Guadeloupe, France
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Fact Sheet 16: "The Slave Route: Traces-memories in Guadeloupe" Itinerary, Guadeloupe, France

United Nations Educational, Scientific and Cultural Organization

The Slave Route: Resistance, Liberty, Heritage

■ BACKGROUND

Guadeloupe became a French possession in 1635. Until slavery was abolished in 1848, over 300,000 slaves were transported there from Africa to provide labour, mostly for the production of sugar, indigo and coffee.

■ DESCRIPTION

'Slave Route. Traces-memories in Guadeloupe' itinerary linking Basse-Terre, Grande-Terre, Marie-Galante and Terre-de-Bas Island (Les Saintes) was established in 2010 to showcase a rich, varied and sometimes unique heritage that often goes unrecognized.

The Departmental Council of Guadeloupe financed the creation of the trail as part of its cultural and heritage policy. It has published a discovery booklet which is available on its website and, in 2012, provided specific signposting.

A ten-member specialist panel of historians and heritage, architecture and tourism experts was set up to implement the 'Slave Route. Traces-memories in Guadeloupe' project and to examine suggestions for new sites that might be added to the trail. The sites for this circuit were chosen on the basis of three main criteria: relevance to the theme of slavery, condition (adequate overall state of conservation) and public accessibility. Care has also been taken to ensure a fair balance between production sites, memorial sites and resistance sites and between sites in Basse-Terre, Grande-Terre, Marie-Galante and Terre-de-Bas (Les Saintes).

The trail currently comprises 18 sites:

1. **Basse-Terre**: Beausoleil plantation; Vanibel plantation; La Grivelière House; Anse à la Barque indigo plantation; Fort Louis Delgrès; Belmont plantation slave dungeon.

2. Grande-Terre: Fort Fleur d'Épée; Victor Schœlcher Museum; Petit Canal monument to the abolition of slavery; Les Rotours canal; La Mahaudière house; Néron house; Anse Sainte-Marguerite slave burial ground.

3. Marie-Galante: Murat plantation; Roussel-Trianon plantation; Mare au Punch pond; east coast indigo plantations.

4. Terre-de-Bas (Les Saintes): Fidelin kiln.

The Schœlcher Museum education service, which is responsible for presenting this trail, offers guided tours to show schoolchildren the sites of the Slave Route in Guadeloupe:

- one-day coach circuits around a given town or region;
- thematic itineraries to visit a particular type of heritage sites:
  - agro-industrial production sites such as indigo factories, sugar mills and coffee plantations,
  - resistance sites,
  - historical and memorial sites.

Heritage workshops on this theme are also organized on request for primary and secondary pupils.

The Departmental Council has produced and posted on YouTube a series of short videos presenting the various sites in this itinerary.

This itinerary of memory presents a number of heritage sites representing different aspects of the history of slavery on the island. The creation of itineraries of memory made up of varied, proven sites is a practice encouraged by UNESCO's Slave Route project.

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National Slave Route Museum, San Severino Castle, Matanzas, Cuba
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Fact Sheet 17: National Slave Route Museum

(Museo nacional de la ruta del esclavo), San Severino Castle, Matanzas, Cuba

■ HISTORIQUE

Cuba has a special place in the history of colonial slavery. As the second land area to be discovered by Christopher Columbus, in 1493, the island experienced the longest period of slavery: from 1511 to 1886, when the practice was abolished. Of the 2.5 million slaves imported to the Spanish colonies from Africa during just under four centuries, almost 40% were taken to Cuba, with a peak matching the boom in first coffee and then sugar growing between 1800 and 1880.

Built to defend the southern part of the island against attacks from privateers and pirates even before the town was established, San Severino Castle is the oldest building in Matanzas, Cuba. It was declared a national monument in 1978. Later, it was chosen to house the Slave Route Museum.

The opening of the Slave Route Museum in San Severino Castle, 100 kilometres to the east of the capital Havana, in 2009 was an important step towards breaking the silence about slavery and the slave trade.

■ DESCRIPTION

In Cuba, the slave system has left much material evidence: hutments where the slaves were crowded together; caves, fortresses, plantations, settlements, the *palenques,* where the fugitive slaves, called Maroons, took refuge, and archaeological remains. San Severino Castle, for example, whose construction - by thousands of African slaves - was completed in 1734, is considered to be the country's oldest piece of architecture. It became the main command centre for the town's defence system. In addition to its visible geographical traces on the island, slavery left a deep imprint on Cuban society. For this reason, the UNESCO Slave Route Project in Cuba has been guided by the island's information programmes on the social consequences and cultural interaction arising out of slavery and the slave trade. The slavery museum illustrates the rich, varied and lasting legacy of African cultures in the province of Matanzas in aspects such as food, music and religion.

This museum has a permanent exhibition called 'Afro-America: the third link', consisting of 105 information panels and 14 African sculptures donated by the Cuban artist Lorenzo Padilla. The exhibition shows visitors the significance of Africanity and its history in the countries of Latin America. It not only presents objects and photographs illustrating the horrors of the slavery period, such as the *calimbo*, a branding iron used to identify blacks as their owner's property, but also provides an overview of Afro-Cuban religion, including the rites, customs and legends surrounding each deity (*orisha*) and objects used in ceremonies. The first room to be opened was devoted to the *orishas*, and is the most popular with visitors. Created with the aim of depicting Africa's rich legacy to Cuban culture, it contains various sculptures of Afro-Cuban deities, together with ritual drums and tapestries showing the environment in which each *orisha* appears according to tradition.

San Severino, a stopping point on the way to Varadero, the island's main tourist centre, receives some 10,000 visitors a year - mainly Cuban, but also tourists of various nationalities. It engages in outreach by organizing various national and international events for researchers but also for school and university students - pupils from UNESCO Associated Schools or students from the University of Matanzas and from Africa - and groups of pensioners. In promoting this memorial heritage, the Cuban authorities have also been keen to highlight the various manifestations of slave resistance and revolt in the 19th century, such as the uprising at the La Dionisia coffee plantation.

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Pelourinho, Historic Centre of Salvador de Bahia, Brazil
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Fact Sheet 18: Historic Centre of Salvador de Bahia, Brazil

United Nations Educational, Scientific and Cultural Organization
Organisation des Nations Unies pour l'éducation, la science et la culture
World Heritage Convention
Convention du patrimoine mondial

■ BACKGROUND

From 1550 onwards, the transatlantic slave trade organized by Portugal brought thousands of African slaves to the coasts of Pernambuco and Salvador de Bahia, which were the main destinations when the colonization of Brazil first began. Towards 1740, traffic to Rio de Janeiro and São Paulo replaced traffic to Salvador de Bahia.

As the first capital of Brazil from 1549 to 1763, Salvador de Bahia was a melting pot of African, Amerindian and European cultures. Today it has 3 million inhabitants - 80% percent being of African descent - and is the capital of the state of Bahia (one of Brazil's largest states, with over 14 million inhabitants and an area of 564,273 square kilometres). Owing to its rich heritage, Salvador de Bahia is an important tourist destination, particularly since the inclusion of its historic centre - made up of the neighbourhoods of Sé, Pelourinho, Misericórdia, São Bento, Taboão, Carmo and Santo Antônio - on UNESCO's World Heritage List in 1985.

Afro-Brazilian tourism in Salvador de Bahia has grown exponentially in recent decades, driven in particular by the State Secretariat of Tourism. This commitment on the part of the Bahia government reflects the growing wish to ensure that the entire population benefits from social and economic development. The development and institutionalization of this form of tourism aims to include communities of African descent in all aspects of the growth of local tourism. The project to promote 'ethnic tourism' - also called 'cultural tourism' or 'roots tourism', depending on the target audience - seeks to involve communities of African ancestry in tourism and heritage development initiatives, and ensure that they partake of the economic benefits, especially in terms of employment.

■ DESCRIPTION

Based on research, meetings and discussions, both the Bahia authorities and tourism agencies have developed promotional programmes and tourist trails. Different trails highlight various aspects of Afro-Brazilian culture, focusing on themes such as the Candomblé religion, the *quilombos* near Salvador de Bahia, urban spaces and cuisine.

The state of Bahia has accordingly developed vocational training programmes for people working in the tourist industry, especially those of African descent. One of the main audiences targeted in Salvador de Bahia is primarily made up of African-American tourists interested in discovering or learning more about the culture and practices of African origin that continue to have a strong presence in Afro-Brazilian culture. The involvement of local communities, especially women, in the development of Afro-Brazilian tourism in Salvador da Bahia is particularly important and interesting, and deserves to be highlighted.

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The Historic Centre of Salvador de Bahia is listed as a UNESCO World Heritage Site:
http://whc.unesco.org/en/list/309/



The samba de Roda of the Recôncavo of Bahia, Brazil
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Fact Sheet 19: Historical and Archaeological Trail Celebrating African Heritage

(O Circuito Histórico e Arqueológico da Celebração da Herança Africana), Rio de Janeiro, Brazil

■ BACKGROUND

Of the 15 million Africans transported to the Americas between the 16th and 19th centuries, over 4 million arrived in Brazil and more than a million landed in Rio de Janeiro, making it the largest transatlantic slave-trade port of the Americas. In recent decades, particularly following the work carried out on the new Porto Maravilha, archaeological digs and studies have helped highlight the historical and cultural importance of Rio de Janeiro's port area for understanding the contribution of the African diaspora to the formation of Brazilian society. The archaeological finds prompted the creation, by Municipal Decree No. 34,803 of 29 November 2011, of the Historical and Archaeological Trail Celebrating African Heritage (*Circuito Histórico e Arqueológico da Herança Africana*) working group to establish collective guidelines for the implementation of policies of memory and policies to protect this cultural heritage.

■ DESCRIPTION

Each site on the trail established by the decree highlights an aspect of the history of Africans and their descendants in Rio de Janeiro's port area, such as Valongo Wharf, which was one of the main slave landing sites in Brazil. Originally built for that purpose, it was converted into a pier to receive, in 1843, Princess Teresa Cristina of the Two Sicilies, who married the future emperor of Brazil, Pedro II. In 1911, the pier was covered over and became Jornal do Comércio Square. The archaeological site was discovered in 2011 when redevelopment of the port area was commenced. *O Cemitério dos Pretos Novos*, literally Cemetery of the New Blacks, illustrates the irreverent manner in which the corpses of people from Africa were treated. Largo do Depósito was the site of a slave market. The historical and religious site of Pedra do Sal was a place of resistance, celebration and meeting for Africans and their descendants, as well as a place of culture and spirituality where heritage practices such as Samba and Candomblé developed. In 1984, the site was recognized by the State Institute of Cultural Heritage (*Instituto Estadual do Patrimônio Cultural* - INEPAC). Finally, the José Bonifácio Cultural Centre, located in the former primary school of the parish o[illegible]ita, approaches education and culture as present-day instruments of liberation and emancipation.

Approximately four guided tours by the director of the Institute of Research and memory of the New Blacks (*Instituto de Pesquisa e Memória dos Pretos Novos* - IPN) are organized each month for groups of up to 80 people. Additional visits are planned to mark specific occasions such as Black Consciousness Week and Samba Day.

These various landmarks will have official signage for the Historical and Archaeological Circuit Celebrating African Heritage and will be given a special place in the Porto Maravilha Cultural Programme. In addition to the signage, the Circuit's working group has established actions to raise awareness of this part of the history of the African diaspora, including guided tours, publications and a variety of promotional activities.

The trail has 15 stopping points, bearing witness to the historical memory of Africa in Rio:

1. Rua da Alfândega: landing of slaves.
2. Praça Quinze de Novembro, rua 1 Março: slave market.
3. Villegagnon Island: quarantining of slave ships from Africa.
4. Rua da Quitanda: market where slaves - known as Negros de Ganho ('slaves for hire') - sold goods on behalf of their masters.
5. Rua Uruguaiana: site of the Rosário church, built by slaves.
6. Rua Rosário: formerly Rua dos Pretos, where the Negros de Ganho sold their goods.
7. Igreja Santa Rita (church): old burial ground for mixed-race slaves and new blacks (Cemitério de Escravos Ladinos et dos Pretos Novos) before its transfer to Valongo.
8. Cais do Valongo (Valongo Wharf): landing wharf for slaves, covered by the Empress's Wharf in 1843.
9. Rua do Valongo: now Rua do Camerino, former slave market from 1769.
10. Rua Barão de São Felix: site where the first Candomblé temples (*casas de santo*) were built; in the early 19th century Islam was practised here, albeit very discreetly.
11. Pedra do Sal: place where Bahians and Africans arriving in Rio lived, now a mecca for samba carioca.
12. Ladeira do Livramento, Casa de Machado de Assis: house of one of Brazil's most famous writers, the son of a mulatto.
14. Cemitério dos Pretos Novos: now Rua Pedro Ernesto, burial ground for African slaves who died shortly after landing (historical site and headquarters of the Instituto Pretos Novos, IPN).
15. José Bonifácio Cultural Centre: historical site and research and information centre on Afro-Brazilian culture.

This trail presents a diverse range of sites that cover various aspects of the life and history of the African and Afrodescendant populations of Rio de Janeiro. Guided tours are free of charge.

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The Valongo Wharf Archaeological Site is listed as a UNESCO World Heritage Site: http://whc.unesco.org/en/list/1548/



Fazenda Machadinha Cultural Centre and restaurant, Brazil
© Solange Cristina Virginio Barbosa

Fact Sheet 20: Fazenda Machadinha, Quissamã, Brazil

■ BACKGROUND

Sugar growing was introduced to the Rio de Janeiro region in 1650 and continued to develop until 1798, when there was a worldwide sugar crisis owing to the slave uprising in Saint-Domingue. Taking advantage of rising prices, sugar mills modernized in order to increase production and improve the quality of their sugar. The government subsequently decided to offer support to the major sugar producers of Quissamã, who combined into a single company to set up the first centralized complex in South America. It was thus that the Quissamã sugar factory, equipped with the very latest machinery, began operating on 12 September 1877. In the second half of the 19th century, however, competition from sugar beet began to damage Brazilian exports. The situation became worse with the global depression of 1929, and many small planters lost their estates to Quissamã's central sugar factory, which eventually had a monopoly over the local economy.

In 1798, the first sugar mill in the Quissamã region was built, while 1803 saw construction of the first house for its owner. Today, although partly in ruins, the Machadinha estate gives some idea of what a *fazenda* - a large landed estate, in this case a sugar plantation - was like.

The estate is now a tourist and cultural complex, established on the initiative of the 8th generation of descendants of Africans transported from Kissama in Angola. It proposes a tour that presents the history of the town of Quissamã through various locations, such as the Casa Quissamã Museum and Sobradinho Cultural Centre, where visitors can discover vestiges of Afro-Brazilian culture.

■ DESCRIPTION

The Fazenda Machadinha comprises:

- the 'Casa Grande' (the master's house, now in ruins);
- former slave quarters, preserved by their owners, descendants of emancipated slaves who stayed on after the abolition of slavery in 1888;
- the old stables;
- Nossa Senhora do Patrocínio chapel.

In 2001, the municipality took over the entire estate to make it a tourist attraction. It restored the former slave quarters and built both the memorial to Quissamã's people of African ancestry and the Casa de Artes.

The former slave quarters, split into 47 dwellings, were saved and restored to their original appearance in 2007. They are currently inhabited by the families of employees of the Quissamã factory, which is currently inactive. These residents preserve the songs and dances of former plantation and sugar-mill slaves (the *fado* and *jongo cantado*) and, as contributors to the *Raízes do Sabor* (roots of flavour) project, the culinary traditions of Machadinha.

Tourism started in 2008, and visitors are now offered guided tours - led by local guides trained by the Afrodescendant community - of the estate's various buildings (the main house, the Nossa Senhora do Patrocinío chapel, the museum). They also have access to the facilities of the Casa de Artes (where cultural events are staged), a shop (where local craft products are sold) and a restaurant (serving typical local food).

The visitors are university students and national and international tourists. The site is promoted by tourist agencies in the town of Quissamã and is featured in English- and Portuguese-language guide books.

In 2009, the region's Afro-Brazilian community was recognized as descending from the Maroons (*remanescente de quilombo*).

The Fazenda Machadinha cultural complex is the product of municipal, state and federal policies with a shared goal: safeguarding the culture, history and heritage of the formative sites of Brazilian society, particularly those where Africans transported to Brazil by European slave traders used to live. The Fazenda is managed by the Afrodescendant community in partnership with the Quissamã Secretariat for Culture and Tourism..

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Samba da Vela, Brazil
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Fact Sheet 21: Afro-Brazilian Tour

(O Roteiro Afro), São Paulo, Brazil

■ BACKGROUND

In 1723, coffee growing was introduced to Brazil in what is now the state of Pará before spreading to the Rio de Janeiro region, where it flourished thanks to demand from the considerable North American market. Large estates of over 1,000 hectares used substantial slave labour. For over a century, the coffee trade accounted for almost two-thirds of the country's export earnings. After the abolition of slavery in 1888, this economic boom was bolstered by the arrival of Brazilians from other parts of the country, such as the Northeast region.

Founded in 1554, the city of São Paulo now has one of the largest proportions of people of African descent in Brazil. The history of this population dates back to the 18th century, when slaves were imported on a large scale, replacing indigenous labour. In the early 19th century, enslaved people were exploited for various types of labour such as domestic chores, farming small plots of land, cutting firewood and working in brick factories, stone quarries, pottery factories, foundries or shoemaker's workshops. The town of São Paulo enjoyed particular prosperity in the 19th century with the boom in coffee growing that led to large numbers of African slaves being imported.

In the late 19th century, Brazilian society underwent significant changes that directly affected the population of African descent. Indeed, the abolition of slavery on 13 May 1888 was the result of intense pressure exerted by runaway and rebel slaves and supported by the abolitionists. The end of slavery did not mark an end to the difficulties endured by the Afrodescendant population, which still faced social exclusion, racial theories, and the ideology and policies of population 'whitening' that aimed to eliminate the African biological and cultural influence on the nation by encouraging European immigration, 'interbreeding' and eugenics. Throughout the 20th century, various movements rooted in black identity emerged with a view to ending prejudice and achieving social equality.

Despite the difficulties it has faced and still faces today, the Afrodescendant population has played, and continues to play, an important role in the cultural and economic development of the city of São Paulo.

■ DESCRIPTION

The Afro-Brazilian circuit was created by the municipality of São Paulo and the company responsible for organizing cultural events and tourism, São Paulo Turismo, in partnership with the Coordination Office for the Black Population (*A Coordenadoria dos Assuntos da População Negra* – CONE), in order to promote cultural tourism in the city. On 25 January 2011, the mayor of São Paulo signed Decree No. 52,743 which established and regulates the creation of this official circuit dedicated to Afro-Brazilian culture in São Paulo.

The circuit suggests different sites to visit in São Paulo, primarily focusing on manifestations and markers of Afro-Brazilian history and culture in the city.

Twenty-one sites of interest in and around the city of São Paulo are presented in a booklet, together with addresses, maps and photographs. Available in Portuguese, English and Spanish, this publication is intended for tourists and any person wishing to explore the city from this perspective.

The tour includes the following sites:

1. Academia Paulista de Letras (São Paulo Academy of Letters)
2. Associação Cultural Cachuera (Cachuera Cultural Association)
3. Casa das Áfricas (House of the Africas)
4. Casa Mestre Ananias
5. Cemitério da Consolação (Consolação Cemetery)
6. Centro Cultural Africano (African Cultural Centre)
7. Centro Cultural do Candomblé (Candomblé Cultural Centre)
8. Grupo Cordão de Ouro (Cordão de Ouro Group)
9. Igreja de Nossa Senhora da Boa Morte (Church of Our Lady of a Happy Death)
10. Igreja Nossa Senhora Achiropita (Church of Our Lady of Achiropita)
11. Igreja de Nossa Senhora do Rosário dos Homens Pretos (Church of Our Lady of the Rosary of Black Men)
12. Igreja de Santa Cruz das Almas dos Enforcados (Church of the Holy Cross of the Hanged Souls)
13. Largo São Francisco, Faculdade de Direito (Largo São Francisco, Law School)
14. Museu Afro Brasil (Afro-Brazil Museum)
15. Axé Ilê Obá (Candomblé temple)
16. Centro de Cultura Afro-Brasileira Asé Ylê do Hozooane (Asé Ylê do Hozooane Centre for Afro-Brazilian Culture)
17. Ilê Alákétu Ibualamo (Candomblé temple)
18. Panelafro
19. Samba da Laje
20. Samba do Monte
21. Samba da Vela

By promoting Afro-Brazilian culture and its history, the tour is also contributing to the development of cultural and historical tourism in São Paulo. At the same time, the tour allows people to pay homage to and preserve the memory of African slaves and their descendants in the city.

The tour is marketed by travel agencies, such as Reality Tour, in partnership with São Paulo city's Graffiti Turismo. In the same vein, routes highlighting other aspects of the city have also been created by São Paulo Turismo to promote the city from different perspectives.

A guidebook published by São Paulo Turismo has been designed so that the tour can be undertaken without a human guide. This guidebook is available in several languages and is provided free of charge, online and from the city's tourism agencies, thus contributing to the promotion of the Afro-Brazilian history and culture of the city of São Paulo.

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Statue of Zumbi dos Palmares, Brazil
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Fact Sheet 22: Route of Freedom

(A Rota da Liberdade), São Paulo, Brazil

■ BACKGROUND

As the land to which the largest number of African slaves were transported (over 4 million), Brazil was the last country in the Americas to abolish slavery, in 1888. Initially concentrated between Salvador de Bahia and Rio de Janeiro, slavery prospered in the state of São Paulo between 1820 and 1850 due to coffee growing. This period, known as the illegal slave-trade period, saw the arrival of over 2,300 shipments of slaves: approximately one million people were thus transported as slaves to southern Brazil despite the prohibition of slavery.

The first coffee-growing *fazenda* (large plantation) in the state of São Paulo was established in 1817 in the Paraíba Valley. Many African slaves were sent there to meet the substantial demand for labour on the plantations. The coffee was exported through Rio de Janeiro. However, soil impoverishment in the Paraíba Valley and the prohibition of the slave trade in 1850 led to a decline in coffee growing after 1860. The valley therefore gradually became deserted, and coffee growing moved westward to the state of São Paulo, where it supplanted sugar growing. After Brazil became independent, coffee growing expanded and soon made the local cities rich.

■ DESCRIPTION

Established in 2007, the Route of Freedom tour covers a dozen towns and over 20 important sites exemplifying the history of black slaves in the Paraíba Valley: Aparecida (church of São Benedito); Taubaté (church of Nossa Senhora do Rosário dos Homens Pretos, founded in 1700); the north coast (São Francisco archaeological site in São Sebastião); Baia de Castelhanos, Ilhabela; the Quilombola communities of Ubatuba, Fazenda Macaco, Casanga, Camburi and Caçandoca; Guaratinguetá (Fazenda Neuchatel, Casa da Irmandade de São Benedito, jongo community of Tamandaré); Lorena (basilica of São Benedito); Piquete (Jongo de Piquete district, Fazenda Santa Lídia slave quarters); São José do Barreiro (Fazenda São Francisco, slave burial ground); Bananal (fazenda that is part of the region's coffee history); São José do Barreiro (Quilombo district, Moçambique da Dona Luzia community).

During the period from 2010 to 2015, an average of 3,000 visitors have taken the tours overall. One-day tours are the most popular, consisting of a visit to a historical monument such as the Palacete Visconde da Palmeira in Pindamonhangaba. They are marketed by São Paulo travel agencies, which generate the largest number of visitors (for an average price of US$75 per person). Most visitors prefer tours with a guide. The majority of visitors are adults and the young people who take part in the tours are mainly students.

Partnerships have been established with private enterprises: Hotel Continental and Apart-Hotel Olavo Bilac in Taubaté (accommodation); Fazenda Neuchatel (one-day tour); Fazenda São Francisco and Fazenda da Barra in São José do Barreiro (tour and accommodation); Mazzaropi Museum (tour); Gramado restaurant in Taubaté; Fazenda Santa Lídia in Piquete (tour and accommodation); Pousada Aconchego in Paraty (accommodation and restaurant). In addition, there are partnerships with public authorities: the municipal councils of around 20 towns; the state government of São Paulo, with the Secretariat for Tourism (participation in trade fairs, development of publicity material); the Ministry of Tourism. There are also partnerships with associations: Brazilian Association of Rural Tourism (Abraturr SP) and the Association of Faith Tourism Guides.

Contact:

Rota da Liberdade, Reality Tour Viagens e Turismo Ltda
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Ribeira Valley Quilombola Tour, Brazil
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Fact Sheet 23: Ribeira Valley Quilombola Tour

(O Circuito Quilombola do Vale do Ribeira), Brazil

■ BACKGROUND

The term *quilombo* comes from the Angolan word *kilombo* meaning a fortified settlement. Captives and slaves manifested their rejection of servitude in various ways around the world. In Brazil, some managed to escape and join quilombos, villages organized into communities of fugitive slaves and Maroons. Today, in Brazil, the term *quilombo* refers to a rural community of descendants of escaped slaves established on land occupied for centuries by their ancestors. These communities maintain their know-how, ethical codes and cultural traditions, as well as historical story-telling, which are handed down from generation to generation. Recognition of their identity and rights (civic and property rights especially) remains a key demand of Quilombola communities today.

The equivalents of the Brazilian quilombos are the *palenques* in Cuba and Colombia, the *cumbes* of Venezuela, the *grands camps* and *ajoupas* of the former French colonies, and the Maroon camps of the former British colonies.

Ribeira Valley is located in the south of the state of São Paulo and the north of the state of Paraná. This area holds great ecological diversity and richness, in terms of both fauna and flora. With more than 2.1 million hectares of Atlantic Forest (Mata Atlântica), it is one of the country's main ecosystems. The valley lies within the Atlantic Forest which has been on UNESCO's Tentative List of Natural World Heritage Sites since 1999. Despite this important natural heritage and great cultural richness, Ribeira Valley has historically been one of the poorest regions of the states of São Paulo and Paraná. Its young population suffers from high unemployment and is forced to emigrate.

The Ribeira Valley Quilombola Tour (*O Circuito Quilombola do Vale do Ribeira*) was initiated by the non-governmental organization Socio-Environmental Institute (*Instituto Socioambiental* - ISA), the Secretariat of Family Farming, the Ministry of Agrarian Development, the National Secretariat of Tourism Policy and the Ministry of Tourism, with the support of Brazil's federal government, the organization Oikos - Cooperação e Desenvolvimento, the Coordination and Advice Team for the Black and Quilombola Communities in the Ribeira Valley (*Equipe de Articulação e Assessoria às Comunidades Negras e Quilombolas do Vale do Ribeira* - EAACONE) and the Federation of Quilombola Associations of Ribeira Valley (*Federação das Associações Quilombolas do Vale do Ribeira* - FAQUIVAR).

■ DESCRIPTION

The Ribeira Valley Quilombola Tour is a unique opportunity to learn about Afro-Brazilian culture by participating in its everyday life, observing its traditions and listening to stories about the various forms of resistance employed in the quilombos during the period of slavery and the struggles, which continue today, for their lands and recognition of their identity and culture.

Visitors discover the region's natural heritage through visits to waterfalls, rivers such as the Ribeira de Iguape and Pedro Cubas, caves such as the Caverna do Diabo with its inner lakes and thousands of stalactites and stalagmites that look like actual sculptures, centres for craft trades and stoneworking, gold trails, mounds of archaeological interest, and the ports of Fora and Abrão.

Tour participants can also visit organic banana plantations and manioc mounds and learn about the traditional medicinal plants and herbs used by the communities. Quilombola gastronomy helps to tell the story of the Ribeira quilombos. Visitors can sample traditional dishes and coffee from the hills.

There are many traditional festivals in the Quilombola calendar, such as the Oyster Festival, Saint Anthony, Saint Catherine, Saint Peter, Our Lady of Aparecida, and Our Lady of the Rosary of Black Men. Cultural attractions such as the 'tutuca no pilão' rice dish and the dances of the Nhamaruca, Trabalhador, Mão Esquerda, Roda de Capoeira and Bandeira do Divino do Espírito Santo are highlights of the tour.

This tour covers six Quilombola communities in the Ribeira Valley, which have been certified by the Palmares Cultural Foundation (*Fundação Cultural Palmares* - FCP):

- São Pedro
- Pedro Cubas
- Sapatu
- André Lopes
- Ivaporunduva
- Mandira

Short thematic visits are also offered to visitors (historic heritage; gastronomy; handicrafts; festive, religious and rural activities). The tour booklet, published in 2012, presents the various visits and activities linked to the history and traditions of each quilombo.

In 2013, a rich inventory of cultural references of the Quilombola communities of Ribeira Valley, containing 180 examples of cultural property, was drawn up and made available for consultation on the internet.

The Ribeira Valley Quilombola Tour has been designed in agreement with the Quilombola communities in order to offer visitors a varied experience and a real immersion in the Quilombola culture and traditions. This participatory community project is also linked to sustainable development and protection of the environment. Therefore, it contributes to the promotion of the region's tangible, intangible and natural heritage, dissemination of the Quilombola history and cultural traditions, and the self-determination of these communities, which are actively involved in this tour.

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20th November Celebration, Brazil
© Fundação Cultural Palmares - photo by Janine Moraes / MinC

Fact Sheet 24: Quilombo dos Palmares Memorial Park

(Parque Memorial Quilombo dos Palmares), União dos Palmares, Brazil

■ BACKGROUND

The conquest of Brazil in 1500 soon led to the deportation of slaves to the north-east of the country. In 1590, a *quilombo* - an autonomous territory of fortified villages established by fugitive slaves - was set up in the Serra da Barriga and provided a refuge for more than 20,000 Maroons who had escaped from mines and plantations. It held out for nearly a century against more than 15 punitive expeditions by the Portuguese, but was destroyed in 1696, a year after the assassination of its leader, Zumbi dos Palmares, who is now regarded as a national hero of the slaves' resistance.

For most of the 17th century, Palmares was the most organized and longest-surviving of the fortified autonomous Maroon territories in Brazil, known as *quilombos* in Portuguese. For almost a century, it managed to defeat the Dutch and Portuguese military expeditions, making it the longest slave revolt in history.

Quilombo dos Palmares Memorial Park was inaugurated in 2007, on a plateau in the Serra da Barriga, on the site of the same name. It was classified by the National Institute of Historic and Artistic Heritage (*Instituto do Patrimônio Histórico e Artístico Nacional* - IPHAN) in 1985 and declared as being in the public interest by Decree No. 96,038 of 12 May 1988. The Memorial Park recreates the atmosphere of the Republic of Palmares, the largest and longest-surviving quilombo in the Americas.

■ DESCRIPTION

In this theme-based park, which is identical in size to the original quilombo and the only one of its kind devoted to the culture of resistance among the country's slaves, one can admire the magnificent landscapes of the Serra da Barriga from some remarkable vantage points (*atalaias*), such as Acaiene, Acaiuba and Toculo. The park serves as a living model, since 16 of the most symbolic buildings have been reconstructed with dried-mud walls (*pau-a-pique*) that are covered in vegetation and inscriptions in the Bantu and Yoruba languages. These buildings include the Onjó de Farinha (flour hut), Onjó Cruzambê (Campo Santo hut), Oxile das ervas (herb yards), Ocas indígenas (indigenous communa[illegible]s) and Muxima de Palmares (Heart of Palmares).

The Memorial Park also provides audio points, where one can listen to music and explanations in any of four languages (English, Spanish, Italian or Portuguese) about the everyday lives and culture of the Quilombola community. The areas in question are Acotirene, Caá-Puêra, Ganga-Zumba, Quilombo, Zumbi and Aqualtune.

In addition, the site has an area (the *Batucajé*) for staging artistic and cultural events (organized by Fundação Cultural Palmares) and a restaurant (the Kúuku-Wáana) which serves traditional Afro-Brazilian food.

The Serra da Barriga site receives some 10,000 visitors a year. Quilombo dos Palmares Memorial Park comprises an archaeological, artistic and cultural complex which has a nationwide appeal. Every year, in October and November, Alagoas state organizes school visits and attracts an international audience with an interest in the life of the leader Zumbi dos Palmares and the work of Abdias do Nascimento (14 March 1914 - 23 May 2011), a Brazilian pan-Africanist politician, anti-racist activist, writer, painter, journalist and actor who campaigned tirelessly for the Quilomba culture to be recognized.

The park does not yet offer guided tours, so visitors make their own way. A wide range of activities (cultural, environmental, memory and sporting) are on offer in the park.

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Jesuit estancias of Córdoba, Argentina
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Fact Sheet 25: Museum of the Jesuit Estancia of Alta Gracia and the Residence of Viceroy Liniers

(El Museo Nacional Estancia Jesuítica de Alta Gracia y Casa del Virrey Liniers), Córdoba, Argentina

United Nations Educational, Scientific and Cultural Organization
Organisation des Nations Unies pour l'éducation, la science et la culture
World Heritage Convention
Convention du patrimoine mondial

■ BACKGROUND

At the beginning of the 19th century, Argentina had a large population of African slaves. Imported via Brazil, they were concentrated in the central provinces and the north-west. The landing of slaves at Buenos Aires supplied labour for the northern provinces of Argentina and, further afield, Bolivia and Peru.

From the middle of the 19th century, this Afrodescendant population gradually disappeared as a result of epidemics, wars and poor living conditions, leaving in its place an officially white population, which, from then on, formed a majority, owing to the arrival of waves of immigrants from Europe. Yet these Afrodescendant populations, which today are a minority, deeply influenced the national culture.

The 38-hectare complex of the Jesuit Block and five of its *estancias* (rural farming and manufacturing establishments) in the province of Córdoba, near the geographical centre of Argentina, contain religious and secular buildings from the 17th and 18th centuries that illustrate an unprecedented 150-year-long religious, social, and economic experiment. The Jesuit Block in the city of Córdoba contains the core buildings of the capital of the former Jesuit province of Paraguay: the church, the Jesuit priests' residence, the university, and the Colegio Convictorio de Montserrat. The Block's supporting *estancias* - comprised of Alta Gracia (located 36 km from the Block), Santa Catalina (70 km from the Block), Jesús María (48 km from the Block), La Candelaria (220 km from the Block), and Caroya (44 km from the Block) - each included a church or chapel, priests' residence, quarters for slaves and indigenous employees, work areas (camps, mills, beating mills, etc.), hydraulic systems (breakwaters, irrigation ditches, canals, etc.), agricultural buildings, and large extents of land for cattle breeding.

Among the rare vestiges bearing testimony to the days of black slavery in Argentina is the Jesuit Estancia of Alta Gracia. This rural centre, which dates from the 17th and 18th centuries, was created by the Society of Jesus to support educational work in Córdoba. It comprised the Jesuits' residence (now a museum), the church, the *obraje* (factory), the *rancheria* (the slave quarters), the *tajamar* (a dike 80 metres long), the flour mills, and the tile and brick kilns.

The main productive force on the site and the skilled labour was provided by slaves of African origin or descent who manned the workshops, performed the building work, tended the livestock and worked the forges, becoming true masters in their craft, evidence of which is still visible today. In 1767, the year when the Society of Jesus was expelled, there were still about 300 slaves on the *estancia*.

■ DESCRIPTION

The National Museum of the Jesuit Estancia of Alta Gracia and the Residence of Viceroy Liniers, which is managed by the Secretariat for Culture, is located in the city of Alta Gracia, in the province of Córdoba.

In 2000, the Jesuit Estancia of Alta Gracia was added to the UNESCO World Heritage List together with the other Jesuit *estancias* in Córdoba. This led to efforts to renovate the museum, incorporating into the narration and historical representation the important social role played by the slaves, which had previously remained invisible. Since 2010, the museum has participated in UNESCO's Slave Route Project, and to this end has set up the Córdoba Slave Route Group. It has joined forces with institutions, researchers and organizations whose members are of African descent, its aim being recognition and preservation of the African cultural heritage in Argentine society.

This project, which is viewed as a long-term undertaking, features in all of the museum's programmes and provides a forum for ideas to which all sectors of society are invited to contribute. Progress has already been observed in the following areas:

1. **Commitment** by all museum staff to work for the recognition and promotion of Africa's contribution to the construction of Argentine identity.
2. **Incorporation** of new themes: cultural diversity, identity and memory.
3. **Recognition** by the community of the black presence in the history of the Estancia of Alta Gracia.
4. **Inclusion** of these themes in the school curriculum.
5. **Identification**, thanks to the work of the Córdoba Slave Route Group, of the memorial sites in Córdoba where black slaves lived during the colonial period, which lasted until the 19th century.
6. **Organization** of the travelling exhibition 'Memorial sites in Córdoba. Black slaves: absence and presence', (*Sitios de memoria en Córdoba. Negros esclavizados: ausencias y presencias*), which has been staged in various cities in Argentina.
7. Wider **dissemination** of knowledge of the black presence in Argentina through lectures, courses, and the publication of new research and specialist bibliographies.
8. Renewed **interest** on the part of the community, locally and at provincial level, in taking part in activities linked to the African cultural legacy.

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The Jesuit Block and Estancias of Córdoba are listed as a UNESCO World Heritage Site:
http://whc.unesco.org/en/list/995/gallery/



The dance of the devils of Zaña (Diablitos de Zaña), Peru
© Oscar Chambi Echegaray/ Museo Afroperuano de Zaña

Fact Sheet 26: Afro-Peruvian Museum of Zaña

(Museo Afroperuano de Zaña), Peru

■ BACKGROUND

Of the 2.5 million African captives brought into the Spanish colonial empire between the beginning of the 16th and the end of the 19th century, more than a third were taken to the Andean region, from the ports of Cartagena (Colombia) and Porto Belo (Panama) in the north, and from Buenos Aires in Argentina in the south. In Peru, slavery lasted from 1528 to 1854.

Two slave-trading routes led to Zaña: the main route went from Cartagena (Colombia) to the north of Peru, while the second route went from the port of Callao (Peru) to Zaña. Slaves were distributed to the region's farms and sugar cane plantations via an overland route from the international port of Chérrepe to Zaña.

According to data from the census published in the book by the historians Maribel Arrelucea and Jesús Cosamalón *La presencia afrodescendiente en el Perú: Siglos XVI-XX* (Ministry of Culture, 2015)[1], in 1791 there were 40,337 enslaved people in Peru, 4,297 of whom were in the northern coastal region where the town of Zaña is located. Today, people of African ancestry account for more than 10% of the country's 28 million inhabitants. Zaña was the first town to be founded by the Spanish colonists in the Lambayeque region, on 29 November 1563. In the 18th century, it had more than 31 *haciendas* (large plantations), as well as 7 religious buildings built by African and indigenous slaves. Instruments of torture and punishment have been found there. The most significant feature of the town, however, is Cerro de la Horca, a hill where slaves were executed.

There is considerable documentation about its history, which has been studied by the researchers Susan Ramirez and Lorenzo Huertas.

■ DESCRIPTION

The Afro-Peruvian Museum of Zaña was founded in 2003 and opened to the public in 2005. Since then, it has been promoting the preservation and development of the tangible and intangible heritage of Zaña and the Peruvian coast. The Afro-Peruvian Museum of Zaña and the municipality of Zaña have signed an agreement to protect, safeguard and promote the cultural heritage and traditions of Zaña.

1 J.A. Cosamalón Aguilar, M. Arrelucea Barrantes. La presencia afrodescendiente en El Perù: Siglos XVI-XX, Lima, Ministerio de Cultura, 2015.

The museum belongs to neither the state, nor the municipality, nor a private company. It is an autonomous entity established according to the idea that after more than three and a half centuries of slavery in Zaña, it was necessary to build a museum to keep alive the memory, freedom and creativity of the population.

The Afro-Peruvian Museum of Zaña comprises two buildings in a rustic architectural style, housing four rooms, in three of which cultural artefacts of African heritage are presented. Many of these artefacts come from the local community, which is very involved in the donation of objects to be exhibited. Special attention is given to the importance of Cerro de la Horca, a key symbolic site of slavery in Zaña. A monument to the freedom of slaves in the Americas was inaugurated there on 30 November 2013.

The mission of the Afro-Peruvian Museum of Zaña is to safeguard, preserve, document, define and educate about the history, cultures and heritage of people of African descent in Peru, from a community perspective. Its objectives are to:

1. produce knowledge about the history, memory, culture and arts of the Afrodescendant population;
2. achieve broad involvement of traditional communities and families so that they play a role in defending and conserving their various forms of African heritage - natural (rivers, nature, the environment), tangible (former slave plantations, colonial places of worship) and intangible (a variety of cultural expressions, oral traditions, spiritual beliefs, festivals and production techniques) - with a view to enhancing the value of their living heritage;
3. reconstruct and bring alive the local history, taking into account cognitive needs, community activities and educational materials in the layout of the rooms and artefacts, and in the accompanying narrative.

The exhibits in these rooms include:

< Zaña in the colonial and slave periods;
< musical instruments;
< documents and artefacts relating to customs and traditions of African heritage;
< photographs and documents about the African diaspora;
< instruments of torture and punishment;
< a courtyard with wooden carts;
< a farmhouse with a room describing the life of farmers in Zaña in the 19th and early 20th centuries;

an artistic creation space for music, signing, dance and theatre.

The museum has a collection of twenty audio recordings of former residents of Zaña made between 1975 and 1985, including accounts and oral histories, mainly about the memory of Zaña passed down from generation to generation in the form of historical stories. The museum also has five wooden carts for transporting sugar cane; instruments of punishment such as chains, irons and shackles found at Cerro de la Horca; maps, photos, paintings and books about the African diaspora, such as pictures of iconic figures like Nelson Mandela and Martin Luther King, and sculptures from Africa, the Caribbean, Brazil, Honduras and Esmeraldas (Ecuador); photographs of traditions and customs, newspaper cuttings, articles and a collection of masks; a collection of musical instruments from various South American countries and several banjos of African origin, recreated in the United States; a collection of copies of photographs taken by the French photographer Eugène Courret in Lima, in the second half of the 19th century.

In an effort to preserve the local history of slavery, the museum has established partnerships with national and international organizations including the UNESCO office in Quito, the Colombian ACUA foundation (set up by the International Fund for Agricultural Development), the municipality of Zaña and the Lambayeque regional government.

In ministerial order No. 187-2015-MC, the Ministry of Culture of Peru recognized the population of Zaña as a living repository of the collective memory, insofar as it is a unique witness of the historic memory and cultural continuity of the black population. This recognition is important for the population as it adds community value to the preservation of its cultural heritage.

The museum has published several works. It organizes a variety of cultural events such as temporary exhibitions, concerts, and training and awareness workshops, particularly on the subject of Afro-Peruvian culture, traditional music and the memory of slavery. Guided tours and lectures regularly take place, as do concerts and performances on musical instruments used in the 18th century.

The Afro-Peruvian Museum of Zaña is a collective, community project made viable by the involvement and active participation of the community, particularly young people and volunteers. The general assembly is made up of members of the community.

Although this museum project has made the participation of community members of African descent its main priority, it has also involved artists and intellectuals, in partnership with the Ministry of Culture and the municipality.

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View of the town centre and bay of Saint-Paul, La Réunion, France
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Fact Sheet 27: The Itinerary of memory: the Slave Route in Réunion's Saint-Paul circuit, La Réunion, France

■ BACKGROUND

Already known to English, Arab, Dutch and Portuguese seafarers, who would stop off on the island to stock up on water and supplies, Réunion began to be developed by the French in the early 18th century. From 1715, the East India Company, which managed the island until 1767, organized coffee growing there. As that required plentiful labour, a slave-trading company was set up. Until the early 19th century, all sloping land on the island was covered with coffee plants. Clove and nutmeg trees were also successfully introduced to the island.

Offering natural protection for landing ships, 'the bay of best anchorage' was the name given by 18th century sailors to the bay of Saint-Paul, as it was protected from the trade winds that can hamper mooring during the cool season (from May to September). Thousands of slaves, mostly from Africa and Madagascar, disembarked on this black sand beach in the 18th and 19th centuries, with the colony receiving approximately 300,000 slaves in the period from 1689 to 1848.

Considered to be an important historical and natural heritage site of Réunion today, the bay of Saint-Paul was the main centre of French colonization and a busy shipping area until the port at Pointe des Galets was opened in 1886.

■ DESCRIPTION

As the epicentre of Réunion's history, the commune of Saint-Paul invites visitors to discover heritage sites associated with the history of slavery. The history circuit, called 'The Itinerary of memory: the Slave Route in Réunion's Saint-Paul', comprises material evidence still dispersed throughout the island's landscape:

1. **The bay of Saint-Paul:** where African captives were disembarked.

2. **The square leading to the landing stage:** on 20 December 1998 - a holiday celebrating the freedom of slaves - commemorative steles were placed there, to mark the 150th anniversary of the abolition of slavery.
3. **The government bridge:** the old landing stage, which was built at the beginning of the 19th century by private companies connected with the development of the sugar industry, and led to an intensification of maritime activity in the bay of Saint-Paul.
4. **The Town Hall:** built using slave labour between 1730 and 1740 for the East India Company, it initially served as a warehouse for storing the colony's primary asset: coffee. Two steles - to women and men, respectively - pay homage to the unknown fugitive slaves known as Maroons.
5. **The former Place du Tribunal:** a place of death, where the gallows stood, between the church, the barracks and most probably the tree from which those who had hunted down Maroons reportedly hung the hands of their victims as proof they had been executed. In 1812, the decapitated corpses of the four slave leaders of the famous Saint-Leu rebellion were displayed at the four corners of the square for all to see.
6. **The slaves' graveyard:** covers an area of 2,500 square metres. The bodies of about 2,000 African and Malagasy captives were buried there in the first half of the 19th century.
7. **The cavern:** where the first French settler set up home with ten Malagasy servants, in November 1663.
8. **The *chemins pavés* (paved pathways)**: Pavé Lougnon, Bois-Rouge and Grande-Montée, built by captives to facilitate the transport of coffee consignments down the cliffs to the maritime loading areas.
9. **Mafate:** a centre for the history of the slaves who escaped into the mountains, where the Maroons were hunted down.
10. **The Le Maïdo Glaciers:** situated at an altitude of 2,500 metres, on the bank of the Grande Ravine, they were Maroon territory.
11. **The Desbassayns family residence:** a typical Réunion sugar plantation. The buildings of the old Villèle sugar refinery date from the first half of the 19th century.

The itinerary is about 40 kilometres long, and can be completed in half a day or a whole day. Some of the sites are located outside of the town of Saint-Paul, and a visit to one of them, the Le Maïdo Glaciers, involves a six-kilometre walk.

Guided tours are organized by the Commune of Saint-Paul tourist office in conjunction with various associations. Some sites have their own signage.

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Website: www.saintpaul-lareunion.com



Statues of the Slave Route in St. Paul, La Réunion, France
© Thierry Nicolas

Fact Sheet 28: Steles, Memory and Slavery Network in the Indian Ocean, La Réunion, France

■ BACKGROUND

Between the 18th century and the late 19th century, the Indian Ocean was one of the centres of the slave trade and slavery, activities that were practised by the Arabs then by Europeans, and involved African, Indian, Malagasy, Chinese and Indonesian peoples..

The 'Steles, memory and Slavery' programme was conceived in the context of the international Slave Route Project launched by UNESCO in 1994, and was implemented by the Association Historun. Its aim is threefold:

1. To give to the different cultural groups who were traumatized during the colonial period concrete points of reference capable of conferring a sense of identity. The Creole islands of the Indian Ocean - Réunion, Mauritius, Rodrigues and the Seychelles - received their populations from the continents of Africa and Asia in the context of the colonial system and, in particular, the practice of slavery, which permeated customs, religions and oral traditions. Intermarriage occurred on a large scale over several centuries.
2. To remind population groups, which are not always aware of the fact, of the close historical and cultural ties that exist between them.
3. To enrich, through works of art, the common heritage of the countries in the Indian Ocean marked by the history of the slave trade and slavery, and to link them in an original artistic itinerary.

■ DESCRIPTION

The programme, which, over a six-year period, aimed to strengthen intercultural bonds between the populations of the region and the memory of a past still very present in everyone's subconscious, has erected steles of memory in four ports linked to the slave trade: Fort-Dauphin in Madagascar, Saint-Paul in Réunion, Mozambique Island in Mozambique and Pondicherry in India.

1. 16 December 2004: erection, in Fort-Dauphin (Madagascar), of two monumental steles created by a Malagasy artist and an artist from Réunion. They stand on one of the main squares on the bay, close to the

town hall and face Réunion in the direction of Saint-Paul. It was from this location that French nationals and Malagasy slaves and conscripts set sail for the French colony of Bourbon Island (now Réunion) between the 17th and 19th centuries. Slavery began there in the 18th century and ended with the French conquest in 1896, when 500,000 slaves were freed.

2. **8 December 2005:** completion, in Réunion, of the second part of the programme in Saint-Paul, the birthplace of the first settlement on the island by two French settlers and ten Malagasies, three of them women, in 1663. Shortly after Bourbon Island was settled, in 1665, the first African and Malagasy slaves arrived on the island via the bay of Saint-Paul. Between 1724 and 1848, between 300,000 and 400,000 slaves were deported to Réunion and Mauritius.
3. **23 August 2007:** erection of a stele on Mozambique Island in memory of the Mozambicans who were sent to settle Réunion from the 17th century onwards or deported to other destinations (Africa, the Americas, the West Indies, the Middle East and the Arab Peninsula) on Arab and European slave ships. Slavery was officially abolished there in 1878.
4. **1 February 2009:** erection of a stele in Le Morne, on Mauritius, in memory of Mauritian slaves, and the construction of a Garden of memory on the Le Morne site, designated a UNESCO World Heritage Site. There was some evidence of slavery on Mauritius by 1638, but it did not begin in earnest until 1724.
5. **27 April 2009:** inauguration of steles in Mamoudzou on the island of Mayotte in the Comoro Archipelago, in memory of the slaves of the Comoro Islands and the Indian Ocean, to mark the anniversary of the abolition of slavery in the French colony. Slavery ended in 1846 on Mayotte, in 1889 on Anjouan and in 1904 on Grande Comore. At the time of abolition, there were just over 12,000 slaves altogether on the islands of the archipelago.
6. **22 January 2010:** construction of a stele in Pondicherry, India, in memory of the first slaves and 300,000 conscripts sent from India to settle South Africa and the islands of Guadeloupe, Martinique, Réunion and Mauritius.
7. **13 October 2013:** erection of a stele in China in memory of the Chinese diaspora, which settled the islands of the Indian Ocean (Réunion, Madagascar, Mauritius, in particular). This project constituted the last phase of the programme.

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Villèle History Museum, La Réunion, France
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Fact Sheet 29: Villèle History Museum, La Réunion, France

■ BACKGROUND

Although it was spotted by Arab seafarers back in the Middle Ages, the island of Réunion remained uninhabited until the second half of the 17th century. Slavery developed at the start of the 18th century, when coffee growing began and plantations were established. This period was marked by the trade of the East India Company. After the abolition of slavery, which took effect on the island on 20 December 1848, thousands of indentured workers from the Indian Ocean were brought to Réunion to cultivate sugar cane, which had become the main crop.

Located in the commune of Saint-Paul, the Panon-Desbassayns-Villèle plantation is one of the largest real-estate legacies on the island of Réunion. It offers a varied architectural complex bearing testimony to the farming of coffee in the 18th century, cotton and particularly sugar cane from 1825 until the definitive departure of the last occupants, descendants of a dynasty of Creole plantation owners, the Panon-Desbassayns-Villèle family.

Today, it houses the Villèle History Museum, created by Réunion's General Council in 1974. Inaugurated in 1976, this is one of the five Museums of France on the island of Réunion.

■ DESCRIPTION

The Villèle History Museum recounts the history of Réunion plantation society from the 18th century until the end of indenture in the 1930s. It evokes the history of the different plantation inhabitants, such as:

- the dynasty of the Panon-Desbassayns-Villèle family of plantation owners;
- African, Malagasy, Indian and Creole slaves;
- bonded labourers after the abolition of slavery in 1848, most of whom came from India and Madagascar;
- finally, *petits colons* (small-time colonists) who worked land leased from landowners.

This aspect of this island's history is particularly marked by the famous Madame Desbassayns, whose cruelty inspired numerous tales and oral legends, which remain alive in contemporary Réunion.

Today, this history museum comprises an architectural complex of seven buildings, some of which are accessible to visitors while others are occupied by the museum services or are undergoing renovation:

- The reception building: the reception building in the courtyard of the museum houses the ticket office and the sales counter. It is a wood-frame construction with panels covered with shingles. This building was completely restored in the 1980s. An old print from 1847 shows a similar building, although with some differences, such as windows in the roof which are no longer there today.
- The ruins of a sugar factory: near the museum entrance lies the former sugar factory, which was built in 1825. This factory was powered by steam and served as a model for other establishments in the west of Bourbon Island. Partially destroyed by a cyclone in 1932, it has never been rebuilt; only the upper part of the smokestack is still standing. The four buildings that still exist on the site today are in ruins and are not safe to enter. Some rare elements remain in place, however, such as two large cast-iron tanks where the process of centrifuging was performed to separate the sugar crystals from the syrup.
- A domestic chapel, the Chapelle Pointue: located on the highest part of the property, the Chapelle Pointue (or Pointed Chapel) was built in 1841. Having been badly damaged by the 1932 cyclone, it was rebuilt in 1933. This unusual building is built as a rotunda, from blocks of stone covered in a thick, ochre-coloured render. The chapel owes its name to its eight-sided pointed roof, which gives its architecture an oriental appearance. Blue and purple stained-glass windows, the work of master stained-glass artist Guy Lefèvre, were made in 1987 when the building was restored.

The plantation owner's house: sited on the lower part of the property, facing the sea, is the plantation owner's house. Its construction was completed in 1788, the date inscribed on the pediment of the main façade. It is built on two floors, the ground floor and first floor. The roof, which could be accessed via a ladder, is terraced and was used in the 18th and early 19th centuries for drying coffee. Today, parts of the museum's collection are displayed on the ground floor of the plantation owner's house:

- the family's furniture;
- period and contemporary maps, prints and paintings depicting the historical context of the island and certain aspects of its slave society.

On the first floor, which is accessed via a staircase located under the veranda facing the ocean, temporary exhibitions are mounted in four rooms used as galleries.

- The plantation owners' kitchen: built in stone, the plantation owners' kitchen is located near the main residence. In Réunion, it was customary to build the kitchen separately from the house to minimize the risk of fire and avoid the discomfort of the smoke produced by the wood fire. Opposite the kitchen entrance, an imposing fireplace occupying almost the entire width of the wall was used to cook over a wood fire. The meals were prepared there until the 1970s. Numerous domestic objects are now displayed in the kitchen behind a glass partition. Prior to the abolition of slavery in 1848, there was also a kitchen for preparing the slaves' meals, although the precise location of that building can no longer be determined.

- The long house: the construction referred to today as the long house was originally two storehouses built alongside each other, which were joined by a wall in the 20th century to create a garage. This long building is located on the southern part of the property and separates the plantation owner's house from the sugar factory and the camp of huts where the slaves lived until abolition and where the indentured workers lived after 1848. Access to these buildings is reserved for staff of the museum and they are not accessible to the public, apart from a space where workshops are occasionally held for schoolchildren, and a small reference room where, by appointment, a selection of works on the history of slavery can be consulted.
- The slave hospital: continuing on from the two storehouses forming the long house, further down, is a small stone building that served as a 'hospital', the term used at that time to designate a plantation's infirmary. The rudimentary structure comprises three small windowless rooms on the ground floor, two of which are directly connected, with two further spaces on the first floor, under the gable roof. Even when sick, the slaves were kept busy doing work compatible with their state of health, particularly making burlap sacks for transporting the sugar. One slave was assigned to the 'hospital' to act as a nurse and oversee the work of the sick slaves. The will drawn up by Madame Desbassayns in 1845 lists all the slaves and the tasks assigned to them. It states that the nurse was called Véronique. Creole and 71 years of age, her value was estimated to be 500 francs at the time. Genealogical research undertaken in 1998 made it possible to trace the descendants of that slave, who was given the patronymic name Carlo after her emancipation in 1848.

In 1996, a memorial room was created in one of the spaces of the slave hospital, on the floor of which are laid basalt slabs inscribed with the name, age, ethnic origin and duties of the slaves living on the estate in 1824. Since its reopening in 1990, the Villèle History Museum has sought to strengthen its historical dimension. It has also gradually opened up to the cultures of the islands and countries of the Indian Ocean region, especially East Africa. Moreover, when the museum reopened in 1990, it became clear that there was a need to establish a collection of iconographic documents, maps and old books to enable visitors to the museum to gain a better understanding of the history of slavery in its most complex reality and most varied representations. Furthermore, while not a central focus of the museum's acquisition policy, contemporary art has been added to its collection since 2001.

The museum also has a documentation centre with a small library and a collection of ancient works.

The Villèle History Museum has established relationships with local residents, many of whom are descendants of slaves or bonded labourers from the former plantation. In addition, it has numerous partners such as the Departmental Council of Réunion, the Circle of Museophiles of Villèle (society of friends of the museum), the Kan Villèle Association (local mobilization group), the Ministry of Culture and Communication, which gave it the prestigious designation Museum of France, and the Directorate of Cultural Affairs of the Indian Ocean (DAC Océan Indien).

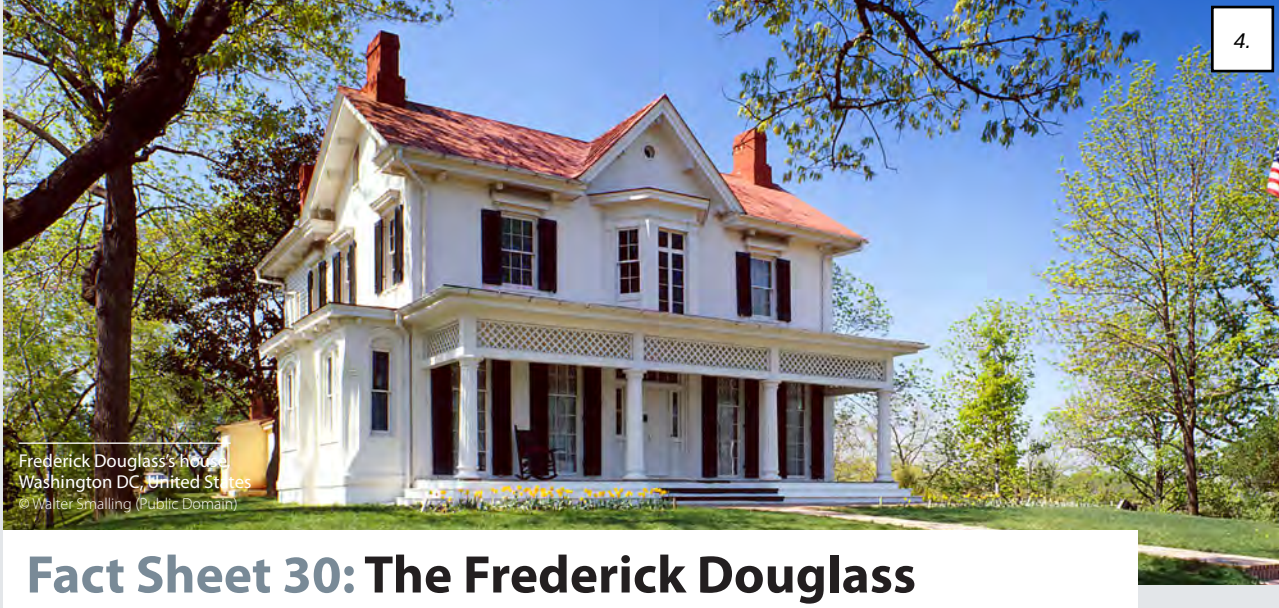
Schoolchildren account for approximately 25% of visitors. The museum is visited by pupils from numerous schools for guided tours of the collections and temporary exhibitions, theme-based workshops, fun activities such as treasure hunts, and special events (Museums Night, Arts Fortnight, European Heritage Days, and the holiday on 20 December that celebrates the 1848 abolition).

A wide range of teaching tools are provided: pre-visit fact sheets; information folders for teaching teams; study packs; information packs on temporary exhibitions and travelling exhibitions; training modules for teachers; documentaries; CD ROMs; a visit notebook for schoolchildren called In the Footsteps of Ombline (a discovery trail for the site and the history of slavery); post-visit assessment forms (with multiple-choice questions); visual documents (categories of slaves, living and working conditions); a bibliography organized by theme; fun materials (colouring sheets, puzzles, paper models, maps of the estate).

In 2016, the museum developed a digital application that will present several visit tours and a wealth of additional information.

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Frederick Douglass's house, Washington DC, United States
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Fact Sheet 30: The Frederick Douglass National Historic Site, National Park Service, Washington DC, United States

■ BACKGROUND

Frederick Douglass was born a slave on a plantation on the eastern shore of Maryland around 1818. He died in 1895 at the age of 77 at his home, Cedar Hill, on the heights overlooking Washington DC. A former slave, he achieved freedom by fleeing north. Douglass was a distinguished public servant and national and international icon: abolitionist; Underground Railroad conductor; civil rights advocate; writer; editor; publisher; lecturer; statesman; U.S. Civil War Union Army recruiter; women's suffragist; District of Columbia Recorder of Deeds; U.S. Marshal for the District of Columbia; and U.S. Minister to Haiti and Charge d'Affairs to the Dominican Republic. Thanks to his actions, which gained him international prominence, Douglass became one of the most prominent abolitionists in the U.S., before taking up a diplomatic role. He is still a source of reference concerning the fight to end slavery and for civil rights worldwide.

The historic site consists of the very house in which Frederick Douglass lived from 1878 until his death in 1895. It was built by John Van Hook, an architect from Philadelphia, Pennsylvania, and its grounds extend over more than six hectares.

In 1900, at the instigation of Helen Pitts Douglass, the second wife of Frederick Douglass, herself an abolitionist and a suffragette, the American Congress gave its support to the establishment of the Douglass Memorial and the creation of the Frederick Douglass Memorial and Historical Association. When Helen Pitts Douglass died in 1903, the Association inherited the property. In partnership with the National Association of Colored Women's Clubs (which Harriet Tubman co-founded), it completed the first restoration of the site in 1922.

On 5 September 1962, Frederick Douglass' estate was incorporated into the National Park Service (NPS), with the Frederick Douglass Memorial and Historical Association as its main partner. Plans for restoring the site were then implemented and the abolitionist's residence re-opened its doors to visitors on 14 February 1972. The site was declared a National Historic Site in 1988.

The site is a member of the American Alliance of Museums (AAM) and of the National Park Service National Underground Railroad Network to Freedom.

■ DESCRIPTION

The site offers guided tours for primary- and secondary-school pupils, students in higher education, teachers and the general public. It welcomes scholars, and offers a range of educational services via the Washington Association of Teachers of the Civil War, including group visits by teachers, distance learning (web videoconferences) and an annual public-speaking competition for students. It also organizes commemorative events and talks.

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Website: https://www.nps.gov/frdo/index.htm



Carter G. Woodson's house, Washington DC, United States
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Fact Sheet 31: The Carter G. Woodson Home National Historic Site, National Park Service, Washington DC, United States

■ BACKGROUND

The son of former slaves, Carter Godwin Woodson gained a doctorate in History at Harvard University in 1912, becoming only the second African American to be awarded a qualification at that level by the University. General ignorance, a lack of information on the history of African Americans and the need to combat racist propaganda claiming the inferiority of black people persuaded Carter Godwin Woodson (1875-1950) to found, on 3 October 1915, the Association for the Study of Negro Life and History (ASNLH), its mission being to highlight the contributions of African Americans and incorporate them into national and international history. Under the leadership of Dr Woodson, the association founded the Journal of Negro History (1916) and the Black History Bulletin (1937), and persuaded associated publishers to publish works by African American authors or on African American history.

In 1926, the association initiated Black History Week, the annual celebration that takes place in the second week in February to honour the abolitionists Frederick Douglass and Abraham Lincoln. Since 1976, the year of the nation's bicentenary, the celebration has been widened to include the history of black people generally. Thus, the president at the time, Gerald R. Ford, urged Americans to 'seize the opportunity to honor the all-too-often neglected accomplishments of Black Americans in every area of endeavor throughout our history'. Since then, every US president has been at pains to make a declaration along similar lines.

Renamed the Association for the Study of African American Life and History (ASALH), its mission has remained that of researching, preserving, interpreting and disseminating information on the culture, history and life of the black community. The ASALH still publishes the two reviews started by Woodson, under the titles Journal of African American History and Black History Bulletin. Woodson's idea of celebrating the history of black people nationally has evolved and expanded into other countries, such as Canada (every February since 1996) and the United Kingdom (every October since 1987).

■ DESCRIPTION

The residence of Carter Godwin Woodson is located in the historical district of Shaw, and its Victorian style is typical of the architecture of Washington DC. After Woodson died, the house continued to serve as the national headquarters of the association until the early 1970s; subsequently, on 11 May 1976, it was designated a 'national historic site'. In June 2002, a report concluded that the house could be incorporated into the National Park Service (NPS), as Woodson is considered the father of African American history.

In 2003, Eleanor Holmes Norton, the representative for the District of Columbia, and her colleagues presented a bill to Congress to allow the NPS to acquire the house and to make it a National Historic Site (NHS) of the National Park Service (NPS). The law also authorized the ASALH to use part of the site for its administrative activities and to maintain the historical link between the association and Carter Godwin Woodson's residence. Thus, on 27 February 2006, the house was officially recognized as a National Historic Site (NHS), with the National Park Service (NPS) assuming responsibility for restoring it and for opening a visitor centre on the site for various activities such as meetings and conferences.

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African American Civil War Memorial, Washington DC, United States
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Fact Sheet 32: African American Civil War Memorial and Museum, Washington DC, United States

■ BACKGROUND

During the American Civil War, which lasted from 1861 to 1865, a small number of units made up of African Americans were formed in 1862 following local enlistment initiatives. However, it was not until the start of January 1863, after the second Act passed by Abraham Lincoln confirming the slave Emancipation Proclamation, that official enrolment of runaway slaves, slaves freed by the Union and free men of African descent began. The United States Colored Troops (USCT) were regiments of the Union Army made up of African Americans. However, various forms of discrimination against USCT soldiers persisted, even though they thought they had proven their commitment to the Unionist cause. Furthermore, wounded or captured USCT soldiers were often summarily executed by the Confederates. At the end of the American Civil War, 25 African Americans (7 marines, 15 USCT soldiers and 3 soldiers from various units) were decorated with the Medal of Honor, the United States' highest military award. During that war of secession, more than 200,000 African American soldiers and 18,000 African American seamen helped preserve the unity of the United States and free more than 4 million human beings being held in bondage.

The African American Civil War Memorial Freedom Foundation and Museum was established in 1992 to tell the largely unknown story of the United States Colored Troops (USCT). Since 2004, the monument and museum have been managed by the National Mall and Memorial Parks of the National Park Service (NPS).

A commemorative monument in honour of those soldiers who fought for freedom during the Civil War was unveiled by Dr Frank Smith Jr and General Colin Powell in July 1998. The monument consists of a sculpture entitled The Spirit of Freedom and a wall of honour. The sculpture depicts soldiers in uniform and a sailor. It is set in the middle of a granite-paved square and is surrounded on three sides by the Wall of Honour, on which are engraved - on 166 steel plaques - the names of 209,145 African American soldiers, drawn from the official records of the Bureau of the USCT at the United States National Archives.

The museum first opened in 1999. In 2011, it changed address and moved to its current location in the historic Grimké Building, named in honour of Archibald Grimké (1849-1930), who was born into slavery but went on to become the second African American to graduate from Harvard Law School.

■ DESCRIPTION

The African American Civil War Memorial and Museum preserve, recount and commemorate the legacy of United States Colored Troops (USCT) and African American participation in the American Civil War.

The museum's aim is to encourage research and help the general public learn about and understand this dramatic period of American history through newspaper articles, photographs, replicas of period clothing, uniforms and weapons dating from the Civil War. It has a database and documents the family trees of more than 2,000 descendants of African American troops who fought for the Union. It provides guided tours for all sections of the public, but more specifically for primary- and secondary-school pupils and university students, invites experts and organizes lectures, workshops for teachers and annual commemorative broadcasts.

During the 2011-2015 period, the museum hosted a range of activities to commemorate the 150th anniversary of the Civil War and promote the various contributions made by African Americans to the nation's history and culture.

The memorial and museum are an integral part of the tours arranged by local, regional and national tourist organizations for groups of all ages. The African American Civil War Memorial and Museum are part of the National Park Service (NPS) National Underground Railroad Network for Freedom. In addition, the museum management has joined the Association of African American Museums and the Association for the Study of African American Life and History (ASALH).

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Entrance of the Schomburg Center, New York, United States
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Fact Sheet 33: Schomburg Center for Research in Black Culture, New York Public Library, New York, United States

■ BACKGROUND

In 1925, a special collection entitled 'The Division of Negro Literature, History and Prints' opened at the New York Public Library in response to the needs of those active in the Harlem Renaissance. Since 1926, it has included the personal collection of the African American author, historian, bibliophile and activist of Puerto Rican origin, Arturo Alfonso Schomburg (1874–1938). Composed of more than five thousand books, three thousand manuscripts, and two thousand drawings and paintings, the works contributed by Schomburg, who was curator of the division from 1932 until his death, immediately gave the division an international reputation. In 1972, the collection became one of the research libraries of the New York Public Library and was named the Schomburg Center for Research in Black Culture. Expansion of the centre in 1991 enabled the creation of exhibition rooms and refurbishment of the American Negro Theatre and the Langston Hughes Auditorium.

■ DESCRIPTION

The Schomburg Center for Research in Black Culture is a department of the New York Public Library. Situated on Malcolm X Boulevard in Harlem, Upper Manhattan, the centre is made up of three buildings: the Schomburg Building, the Langston Hughes Building and the Landmark Building. The centre has several reference rooms: the Jean Blackwell Hutson Research and Reference Division, the Manuscript Room, Archives and Rare Books, a room reserved for consulting photographs and another for multimedia. Containing more than ten million items, it is one of the main research centres dedicated to the history and culture of African Americans, the African diaspora and Africa.

In 2015, it was awarded the National Medal for Museum and Library Service. Each year, the American Negro Theatre and the Langston Hughes Auditorium host new projects, plays, exhibitions and lectures. Among recent exhibitions staged by the Schomburg Center, which these days are taken all over the world, two, relating to human trafficking and slavery, deserve a special mention: 'Lest We Forget: The Triumph Over Slavery', produced in collaboration with the Slave Route Project in 2004 to mark the United Nations International Year to Commemorate the Struggle against Slavery and its Abolition and, in 2013, 'Africans in India: From Slaves to Generals and Rulers'.

The Schomburg Center also houses the Lapidus Center for the Historical Analysis of Transatlantic Slavery, created and funded by Ruth and Sid Lapidus, with a collection of rare documents and collections of books and documents on slavery throughout the world. In addition, fellowships are awarded to young scholars working on transatlantic slavery or abolitionism, thus opening up new avenues in African American studies and studies of the African diaspora. The Harriet Tubman Book Prize, awarded for the first time in 2016, rewards the author of a book published in the United States in the course of the previous year on the subject of the slave trade, slavery or abolitionism.

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Aerial view of the African Burial Ground National Monument, New York, United States
© United States - National Park Service (Public Domain)

Fact Sheet 34: African Burial Ground National Monument, National Park Service, New York, United States

■ BACKGROUND

In the early 18th century, the city of New York had the second largest urban slave population in the United States. Four in ten households had at least one slave. Brought in via the Atlantic slave-trade networks, the slaves started to arrive on the scene in the 16th century, when New York - then called New Amsterdam - was a Dutch colony. The city, which contained more than 10,000 slaves by the end of the 18th century, became English in 1664 and abolished slavery in 1827.

From the 1690s until 1794, free and enslaved Africans were buried in a burial ground measuring 2.6 hectares in Lower Manhattan, outside the boundaries of the settlement of New York. Lost to history, the site was rediscovered in 1991. Studies of the unearthed skeletons revealed evidence of the extreme harshness of the lives of New York slaves, who were used, in particular, in the construction and activities of the port. The main findings of the analyses undertaken were that the slaves suffered from malnutrition, bone growth disorders, an exceptionally high premature death rate in relation to the rest of the city's population and work-related back injuries.

The African Burial Ground National Monument in New York is located at 290 Broadway in Lower Manhattan. The burial ground, which was discovered beneath a construction site in the early 1990s, was a former cemetery - marked on a map from 1755 as 'Negros Burial Ground'. Of the 15,000 to 20,000 people who would have been buried on the site according to historians' estimates, the remains of 419 women, men and children buried between the 17th and early 19th century were found and exhumed. The burial ground was designated a National Historic Landmark (NHL) in 1993 and a national monument in 2006. Since its designation as a national monument, it has been managed by the National Park Service (NPS). In 2003, recognizing the historical and symbolic importance of this archaeological site, the United States Congress allocated funds for the creation of a memorial and requested a revision of the plans for the construction of the federal court planned at that location.

■ DESCRIPTION

The scientific and historical exploration of the site, considered to be the only protected urban slave burial ground in the United States, was entrusted to Howard University (Washington DC), and a week of events was organized to coincide with the return of the excavated remains to their original location. Once the analyses had been completed, the excavated remains were reinterred at the monument in October 2003, during a commemorative ceremony organized with the Schomburg Center for Research in Black Culture.

Following a competition which received more than 60 entries, the winning commemorative monument, created by the architect Rodney Leon, was inaugurated in 2007. In 2010, a visitor centre and an exhibition hall were opened nearby in order to provide keys to interpreting this exceptional historic site and the history of people of African descent in New York.

The interest and involvement of the African American community following the discovery of this site played a crucial role in the recognition of its historical and symbolic importance, the protection and study of the remains, and the project of building a memorial. Thus, the activism of members of the African American community - through the organization of demonstrations, lobbying, petitions and alliances - was decisive. The excavation project was entrusted to the anthropologist Michael Blakey and his team at Howard University, which was originally founded for students of African descent.

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"The Old Plantation", South Carolina, United States, circa 1790
© Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition (Public Domain)

Fact Sheet 35: Gullah Geechee Cultural Heritage Corridor, National Park Service, North and South Carolina, Florida, Georgia, United States

■ BACKGROUND

The Gullah Geechee community is made up of the descendants of African captives deported to be enslaved and exploited on the plantations on the coasts of North and South Carolina, Georgia and Florida. The Gullah Geechee have preserved many of the traditions of their African heritage thanks to the geographical impediments of the coastal landscape and the strong sense of belonging to their community. Consequently, they possess one of the most original cultures in the United States, a culture which is passed on from generation to generation and is the result of traditions brought from Africa but also of mixing with other cultures encountered during and after the period of slavery.

The Gullah Geechee Cultural Heritage Corridor stretches along the eastern seaboard of the United States, from Wilmington in North Carolina to Saint Augustine in Florida. The geographical area of the Corridor is approximately that designated in 1865 at the time of the abolition of slavery in the United States by Special Order No. 15, which promised that this would be a self-governing territory for settlement by emancipated slaves. In 1866, the Order was rescinded. Communities did nonetheless gradually settle in the area, acquiring acreage and promoting self-sufficiency, an important factor in sustaining the Gullah Geechee culture which includes a strong attachment to the land and its African heritage.

■ DESCRIPTION

The creation of the Corridor and the commitment to preserving the Gullah Geechee heritage are the result of a series of initiatives. In 2004, Congressman James E. Clyburn introduced a bill to establish the Corridor. That same year, the National Trust for Historic Preservation placed the Gullah Geechee coast on the list of America's 11 Most Endangered Historic Places. At the request of Congress, in 2005 the National Park Service completed The Low Country Gullah Culture Special Resource Study and Final Environmental Impact Statement (which is available online).

The Gullah Geechee Cultural Heritage Corridor was recognized by the United States Congress as a national heritage area on 12 October 2006 (Public Law 109-338), within the framework of the National Heritage Areas Act. As such, it does not form part of the National Park Service, although the Act does authorize the Department of the Interior to provide it with technical and financial assistance with development and implementation of its management plan.

The Heritage Corridor was created to:

1. Recognize the significant contributions made by the culture and history of Gullah Geechee African Americans.
2. Help local and state authorities, as well as private and public organizations in North Carolina, South Carolina, Georgia and Florida, learn more about the Gullah Geechee community's history and preserve its cultural heritage (including crafts, arts, folklore and music).
3. Help with the identification and preservation of historical sites, archives, artefacts and objects connected with the Gullah Geechee, in order to raise awareness of this African American heritage among as wide an audience as possible.

The Corridor provides an opportunity not only to better understand the development and evolution of Gullah Geechee identity in the four states in question but also, more broadly, the Creole identities resulting from interactions between various regions of the world.

The local coordinating body legally responsible for running the Gullah Geechee Cultural Heritage Corridor is the Gullah Geechee Cultural Heritage Corridor Commission. It is a federal commission made up of 15 members appointed by the Secretary of the Interior, representing the states of North Carolina, South Carolina, Georgia and Florida. Ten members are proposed by the head of the State Historic Preservation Office and the other five are experts in historic, anthropological and cultural preservation, specializing in Gullah Geechee culture. Several of its members are also members of various heritage preservation organizations: the Association for the Study of the Association for the Study of African American Life and History (ASALH), the Association of African American Museums (AAAM), the National Underground Railroad Network to Freedom, National Park Service (NPS), the National Trust for Historic Preservation and the National Park Service (NPS). A partnership has also been set up between the authorities at the local and state levels and public and private organizations in the four states involved in the Gullah Geechee Cultural Heritage Corridor.

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A Ride for Liberty - The Fugitive Slaves, painting by Jonathan Eastman Johnson between 1860 and 1864, United States
© Eastman Johnson (Public Domain)

Fact Sheet 36: National Underground Railroad Network to Freedom, National Park Service, United States

■ BACKGROUND

Wherever people were enslaved, there was a desire to resist. The Underground Railroad refers to the phenomenon of resistance to slavery by fleeing, as African American fugitive slaves did in the United States until the end of the Civil War. There were secret routes leading to the states of the north, which from the late 18th century began to gradually abolish slavery, and Canada where slavery had already been abolished in 1834, but also to Mexico, Spanish Florida, Indian country, the west, the Caribbean and Europe. The fugitives (or freedom seekers) demonstrated great ingenuity and intelligence in planning and executing strategies at every stage of their flight. While the fugitives mostly completed their journeys unassisted, with each passing decade of legal slavery, active efforts to help the runaways increased. In some cases, that help might be spontaneous. However, in 1850, a second Fugitive Slave Act was passed by Congress, which had a Southern majority. While the Fugitive Slave Act of 1793 had decreed that responsibility for catching runaway slaves lay with the authorities of the states from which the slaves had fled, the 1850 Act authorized the search for and capture of fugitives throughout the United States, made it a crime to aid fugitive slaves and withdrew the alleged fugitives' right to defend their cases in a trial. That was when the Underground Railroad was organized. The network, which was set up at the beginning of the 19th century, was most active between 1850 and 1860. The 1850 Fugitive Slaves Act prompted the largest migration of African Americans to Canada in the 19th century. Canada, which was then a British possession where slavery was banned, was a safe destination, its long border offering many entry points. It is estimated that in the 1850s, more than 100,000 slaves escaped to the north by this means.

The National Park Service (NPS) became involved with the Underground Railroad following Public Law 101-628 of November 1990 which instructed this federal agency - which is responsible for the management of national parks and monuments, and other historical properties and protected areas - to study alternatives for commemorating and interpreting this historical phenomenon.

Under the supervision of an advisory committee, as specified in the legislation, the NPS completed a study in 1995. It proposed and evaluated several commemoration options that the advisory committee recommended implementing. The findings of this study set the s[illegible] the National Underground Railroad Network to Freedom Act of 1998, which established the Netwo[illegible]s still active today.

■ DESCRIPTION

The National Underground Railroad Network to Freedom programme was introduced by Public Law 105-203 and is overseen by the National Park Service (NPS).

It coordinates initiatives undertaken at historical sites and in museums to preserve the heritage, commemorate the slaves and educate the public in direct relation to the history of the Underground Railroad, as well as programmes linked to this history, scattered across a patchwork of local, national and regional stories. Supported by community initiatives throughout the country, the programme also serves to facilitate communication between scholars and to mobilize help for the development of organizations to protect the sites of this network. By encouraging research, education, commemoration and preservation, the programme shows that this historical phenomenon of resistance to slavery through flight played a crucial role in the movement to abolish slavery in the United States.

The aims of the programme are to:

1. **Raise** public awareness of the historical importance of the Underground Railroad.
2. **Provide** technical assistance with documenting, preserving and interpreting the history of the Underground Railroad.
3. **Develop** a network of historical sites, educational and interpretive programmes, researchers and educational establishments having a verifiable connection with the Underground Railroad.

The programme is administered by a national management committee made up of a national NPS manager and regional members representing the various regions connected to the history of the Underground Railroad. Applications from new members are examined at public meetings, the locations of which change in order to promote interaction with and interest in the Network in the different regions of the country. The regional managers of the Network look for formal and informal partnerships to stimulate interest in the subject and activities of the Network.

Within the NPS, the Act of 1998 calls on the Network managers to identify associated sites and themes. Meanwhile, the programme staff aim to integrate existing activities, studies and programmes into the NPS units and to foster the cooperation of federal and local agencies, organizations and individuals.

In April 2016, the Network had 583 members, including 427 historical sites, 109 interpretation or education centres and 67 research centres.

The National Underground Railroad Network to Freedom enables individuals and organizations to join a national system of historical sites, interpretive programmes, research centres, archives and museums. One of the objectives of the Network is to encourage exchanges between its members so that they exchange programme models, case studies, teaching materials and technical advice.

In October 2000, as part of the Omnibus Appropriations Act, Public Law 106-291, the Network to Freedom Grants programme was established to provide support for 'preservation and related research' to members of the Network to Freedom. In total, 79 grants have been awarded for almost US$1.9 million.

Since 2007, the Network has also organized an annual conference. These thematic conferences, held in different locations, encourage dialogue and the partnership and collaboration possibilities that may emerge from that dialogue.

The programme has also developed a website that includes a history of the Underground Railroad, historical documents, a map of the Network, life stories, news on events associated with the Network, technical assistance for site owners and a discussion forum.

Through the resources produced by members of the Network, the Underground Railroad Network to Freedom helps raise awareness of and demystify the history of the Underground Railroad, which was very real and is today central to understanding the history of slavery and resistance in the United States. This unique programme brings together a large number of actors, from a broad spectrum of specialities and fields, around a subject and connects them throughout the territory of the United States. Thus, it has stimulated and coordinated the creation of non-profit organizations and government agencies that share resources and cooperate in the fields of education, preservation and commemoration on the subject of this history.

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Actors of the Colonial Williamsburg Foundation,Virginia, United States
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Fact Sheet 37: Colonial Williamsburg Foundation, Virginia, United States

■ BACKGROUND

The first Africans to be deported to North America during the transatlantic slave trade landed in Virginia in 1619. By 1775, 52% of the population of Williamsburg in Virginia was of African origin or descent, and most of them were slaves.

From 1699 - the year it was founded - to 1780, Williamsburg was the largest, most populous and most influential British colony in North America.

In the early 20th century, the restoration and rebuilding of Colonial Williamsburg were sponsored by William Archer Rutherford Goodwin and the Rockefeller family.

■ DESCRIPTION

The Colonial Williamsburg Foundation is a private, non-profit organization whose mission is to preserve and interpret the historic area as well as operating for-profit activities and subsidiaries such as hotels, restaurants, convention facilities, golf courses and products for the tourist market. In addition to the historic area, the Foundation runs the DeWitt Wallace Decorative Arts Museum, the Abby Aldrich Rockefeller Folk Art Museum, the John D Rockefeller Jr Library and Bassett Hall.

The 301 acres of this historical area contain buildings dating from 1699 to 1780, structures from the neo-colonial period and other, more recent, restored buildings, illustrating colonial history and the American War of Independence (1775-1783). They include the Raleigh Tavern, the Capitol, the Governor's Palace, the courthouse and Bruton Parish Church. Actors dress in period costume and speak using colonial vocabulary and grammar.

The Colonial Williamsburg Foundation also actively supports history teaching in schools about the beginnings of the United States, specifically through a wide range of educational and promotional programmes and materials: publications, videotapes and audio recordings about the stories, language and music of the 18th century, as well as digital tools, some of which are interactive and allow pupils to 'converse' with people of the past who were either actively involved in or witnes[illegible] American Revolution.

Study visits, as well as seminars, conferences, forums and workshops, are also on offer to students in higher education and to teachers wishing to hone their teaching skills.

The Colonial Williamsburg Foundation has been greatly criticized for having long neglected the part played by African Americans - freemen and slaves - during the colonial era. It is true that when it opened, in the 1930s, the Foundation practised racial segregation (separate dormitories for white and black employees and a ban on blacks entering hotels, shops and restaurants frequented by whites) and that, in the 1950s, African Americans were only allowed to visit the site on a specific day of the week, which remained the case until segregation was abolished. In the 1970s, in response to the criticisms levelled against it, the Colonial Williamsburg Foundation increased the number of African American actors/performers. In 1994, it added to its scenarios scenes of slaves getting married and slaves being sold, and, in 1999, set up a project about slavery in the 18th century and life on a plantation.

Nowadays, several programmes offer visitors the opportunity to discover the history of slavery in Williamsburg. The Revolutionary City tour allows visitors to interact with a range of people from the time of the American Revolution. Visitors can discover the history of African American resistance as they visit historic buildings and workshops such as the Peyton Randolph House and Great Hopes Plantation. The African American Religion exhibit traces the heritage of the Baptist congregation in Williamsburg in the late 18th century. In addition, the Equiano Forum on Early African American History and Culture is an ongoing series of lectures about the transatlantic slave trade and resistance.

The museum's originality lies in the major reconstruction and restoration work undertaken and the use of actors on the site to bring the history alive. The Foundation places particular importance on the historical accuracy of its reconstructions and choices of performances.

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Thomas Jefferson's House in Monticello, Virginia, United States
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Fact Sheet 38: Monticello, Thomas Jefferson's House, Charlottesville, Virginia, United States

United Nations Educational, Scientific and Cultural Organization · World Heritage Convention
Organisation des Nations Unies pour l'éducation, la science et la culture · Convention du patrimoine mondial

■ BACKGROUND

In 1720, after the English immigrants had claimed the lands bordering the navigable rivers of the coastal plain of Virginia, colonization spread west towards the Blue Ridge Mountains. In the 1730s, Thomas Jefferson's father, Peter, was one of the first settlers of what would become Albemarle County. There, he established a cotton plantation that he called Shadwell, later renamed Monticello by his son. Through the actions of Peter Jefferson and other settlers, the slave plantation culture spread from the Tidewater region further west, becoming increasingly embedded in colonial life in Virginia due to the expansion of the slave trade.

Monticello, a UNESCO World Heritage Site, was the residence and plantation of Thomas Jefferson, the principal author of the United States Declaration of Independence and the country's third president. Jefferson owned 607 slaves, the majority of whom lived and worked on the Monticello plantation and in the nearby 'quarter farms'.

Monticello itself was a 'quarter farm', a satellite farm of the main estate. Peter Jefferson and his wife, Jane Randolph Jefferson, owned more than 60 slaves who were mainly put to work farming tobacco destined for the British and European markets. This land, combined with the additional holdings acquired by Thomas Jefferson over his lifetime, totalled some 2,023 hectares. As well as Monticello, the 'home farm', Jefferson acquired surrounding parcels of land that were divided into 'quarter farms'. These 'quarters' were called Lego, Tufton and Shadwell (after the name of his father's home farm) and were sometimes managed by overseers or other family members. Throughout Jefferson's adult life, 100 to 150 enslaved men, women and children worked on these 'quarter farms'.

■ DESCRIPTION

The property has been open to the public since 1924. Today, it is managed by the Thomas Jefferson Foundation, a non-profit organization working in the areas of preservation and education. Historians, restoration specialists and archaeologists have carried out more than 60 years of documentary and archaeological studies of Monticello, particularly its slave community, encompassing several generations of families. Among those families are the Hearns, Fossetts, Gillettes, Grangers and Hemings. These families were frequently separated by sales of their members or dispersed after obtaining their freedom.

Since 1993, the Thomas Jefferson Foundation has worked to address the complex subject of slavery through general and specialized tours, exhibitions, films, the launch of a website and a mobile application. Furthermore, the Foundation has been recording the oral histories of the descendants of slave families from Monticello for more than 20 years, an undertaking known as the Getting Word oral history project. In 2014, the Thomas Jefferson Foundation also began a project to restore and reconstruct the places where Monticello's slave families lived and worked, along Mulberry Row, the main road on the plantation. The structures and exhibits on Mulberry Row reveal the personal stories of the slaves, as well as of Jefferson and his family. All these initiatives make Monticello one of the main historical sites giving a clear interpretation of slavery on North American plantations.

In the 1950s, archaeological work and documentary research was intensified with a view to gaining a better understanding of the work and composition of the plantation's workforce. Slave workers were described as 'servants' on notice boards and during visits. However, at the start of the 1980s, following additional archaeological and documentary research, the management and researchers decided to more directly address the subject of slavery, starting with exhibitions presenting the archaeological findings about the life of the slaves at Mulberry Row. Combined with the documentary information, these details of the life of the slaves were presented to the public in 1993 in an exhibition to mark the 250th anniversary of Jefferson's birth, as well as during tours of the main house, Mulberry Row and its outbuildings. The service areas at Monticello were located in the basement and along the house's north and south wings. In 2001, most of those service areas were restored, including the kitchen, the chef's bedroom and the wine cellar. Each of these spaces is brimming with archaeological objects and documentary information about the people who worked and lived in them. The interpretation aspect concentrates on specific scenes from the lives of the slaves at Monticello, focusing on their skills and on accounts of individual experiences of servitude and freedom.

In 2012, the Thomas Jefferson Foundation created a website to continue telling the story of the slave families at Monticello: *Landscape of Slavery: Mulberry Row at Monticello*[1]. Then, from 2014 to 2017, the restoration of structures along Mulberry Row through the Mountaintop Project gave a better feel of the area surrounding the main house and Mulberry Row, as it would have been during Jefferson's lifetime. A mobile application called *Slavery at Monticello: Life and Work along Mulberry Row* was also launched in 2015, providing short life stories and images of architectural and documentary content to supplement the information presented on the interpretive panels.

1 https://www.monticello.org/mulberry-row

The Thomas Jefferson Foundation has a dual mission of preservation and education. Its preservation mission goes beyond conservation of the main house and its collections. Monticello's Department of Archaeology is also conducting an archaeological survey of the plantation and a systemic analysis of the landscape. These methods, correlated with others, have made it possible to develop a broader research agenda to include the evolution of the Monticello plantation over time, changes in the way slaves lived and changes in agricultural production methods, which are not always highlighted in the documentary evidence. More than 38 spaces have now been restored at Monticello, showing the living and working conditions of both the slaves and free residents. On Mulberry Row, a single-room dwelling, which may have been the house of the slave John Hemings, who worked as a carpenter, and his wife Elizabeth Hemings, has been reconstructed on its original site after thorough research and after the objects found during the archaeological digs had been protected.

The Thomas Jefferson Foundation has three main collections. The largest collection is made up of the findings from the archaeological digs at Monticello and the neighbouring 'quarter farms'. It contains more than a million objects, half of which come from Mulberry Row and other sites such as dwellings and agricultural buildings on the plantation. The second collection contains objects from Monticello's main house and its outbuildings. The Foundation holds and exhibits thousands of original artefacts including furniture, works of art, books, and ceramic, glass and metal pieces. Some of these items were associated with the sites where the slaves lived and worked. The third collection consists of the living flora grown in the ornamental and working gardens and orchards. They have been restored in the area around the main house and Mulberry Row and contain hundreds of varieties of fruits, vegetables, trees and plants that would have been grown at Monticello in Jefferson's time, or varieties very close to those grown at that time. The seeds of most of these plants are harvested and then sold or exchanged by the Thomas Jefferson Center for Historic Plants, which is based in Tufton, one of the original 'quarter farms'.

The African American Graveyard is introduced by a panel indicating that an official inauguration ceremony was held to commemorate the site as 'blessed land' in 2001. Other plaques acknowledge the contributions of the Garden Club of Virginia for its work restoring Monticello's gardens and features of the landscape, most recently by helping restore Kitchen Road, part of the plantation landscape that had been forgotten.

The UNESCO World Heritage plaque is displayed at the centre of the site.

The Thomas Jefferson Foundation also runs the David M. Rubenstein Visitor Center at Monticello, with a café, exhibitions, a souvenir shop and teaching facilities, as well as an introductory film. One of the main exhibitions, 'To Try All Things: Monticello as Experiment' provides additional information about the material culture of domestic slavery as well as bibliographic information. In addition, less than 1 kilometre from the visitor centre is the Robert H. Smith International Center for Jefferson Studies (ICJS). The ICJS has a research library specializing in subjects linked to the founding era and the beginnings of the American Republic, as well as access to databases on that period. The ICJS also offers students from around the world research fellowships and hosts a variety of conferences and panel discussions. Several fellowship beneficiaries have undertaken research into subjects closely related to Thomas Jefferson and slavery on the plantations.

According to sections 5.3 and 5.4 of the periodic report on the UNESCO World Heritage Sites (2013), the authenticity of the main house and its surroundings has been preserved and their integrity is intact. The report mentions that Monticello remains in 'an excellent state of preservation'.

The Thomas Jefferson Foundation has 180 full-time employees, 190 part-time employees and 100 volunteers.

An outdoor guided tour of the plantation called 'Slavery at Monticello' is offered six times a day during high season, from mid-March to early November. This tour is also available on several weekends during low season and during Black History Month in February. Each year, around 50,000 visitors take this tour. In 2015, the majority of visitors were from the United States (95%) and 50%t of visitors were couples or groups of adults, 35% were families with young children and 15% were groups of students. Visitors come to Monticello from all over the United States as well as many other countries.

Monticello is one of the best documented plantation sites in North America and was also the main home and plantation of the principal author of the American Declaration of Independence. For United States citizens, Jefferson is an important historical figure given his role in articulating the values of freedom and self-government that the citizens of the United States consider to be a fundamental element of their national identity. However, Jefferson did own 607 slaves during his lifetime. Monticello is a site of memory that integrates the important ideals of freedom and self-government combined with the central role of slavery in the economy and society of the United States.

Monticello offers a variety of online materials that explore the landscape and legacy of slavery on this site.

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http://www.monticello.org/site/plantation-and-slavery
http://www.monticello.org/site/visit/landscape-slavery-mulberry-row-monticello
http://slavery.monticello.org/getting-word
http://www.monticello.org/slavery-at-monticello
Monticello and the University of Virginia in Charlottesville are listed as a UNESCO World Heritage site: http://whc.unesco.org/en/list/442/



Monument to Dr Sousa Martins, Lisbon, Portugal
© Manuel Correia (Public Domain)

Fact Sheet 39: Lisbon, an African city - Memorial itineraries and sites of the African presence

(Lisboa, Cidade Africana - Percursos e Lugares de Memória da Presença Africana), Lisbon, Portugal

■ BACKGROUND

Portugal is a special case in the history of the slave trade and slavery. It played a precursory and major role in the deportation of African captives to the Americas.

Won from the Moors in 1147, Lisbon acquired a new political dimension when the Portuguese court moved there; in 1256, it became the capital of the Kingdom of Portugal. Trade, population growth and the construction of city walls, towers, palaces, churches, residential quarters, public buildings and spaces such as warehouses and marketplaces, gave a new impetus to the medieval city. In the Portuguese colonial empire, the slave trade was essentially conducted in a straight line, which went directly from Angola to the coasts of Brazil. This is why Lisbon, unlike its British and French counterparts, was not a major slave port, even though interactions with Africa and the wealth extracted from the colonial empire shaped the architecture of the city, an influence which is still visible today.

■ DESCRIPTION

Lisbon, an African city - memorial itineraries and sites of the African presence' (*Lisboa, Cidade Africana, – Percursos e Lugares de Memória da Presença Africana*) is a historical tour that leads the visitor around the city to discover a little-known side of Lisbon. It shows visitors Africa's contribution to the behaviours, practices and values that still permeate everyday life and even the Portuguese identity. A tourist route has been designed to reveal Lisbon's Africanness, evident in various vestiges linked to the slave trade and slavery, the traces of which are now mostly intangible, but to which the history of certain sites testifies:

I. Riverfront Lisbon: power, trade and entertainment

1. Monastery dos Jerónimos and the Tower of Belém
2. The Port of Lisbon
3. Terreiro do Paço *versus* Praça do Comércio
4. The city's wharves, and its social and trading relationships

II. Lisbon, the city of the seven hills

5. Rossio, Largo de São Domingos and Praça da Figueira
6. Mouraria, Graça, Alfama: social and religious customs
7. Campo de Sant'Ana and Rua das Pretas, on the climb up to the Chiado

III. Mocambo District

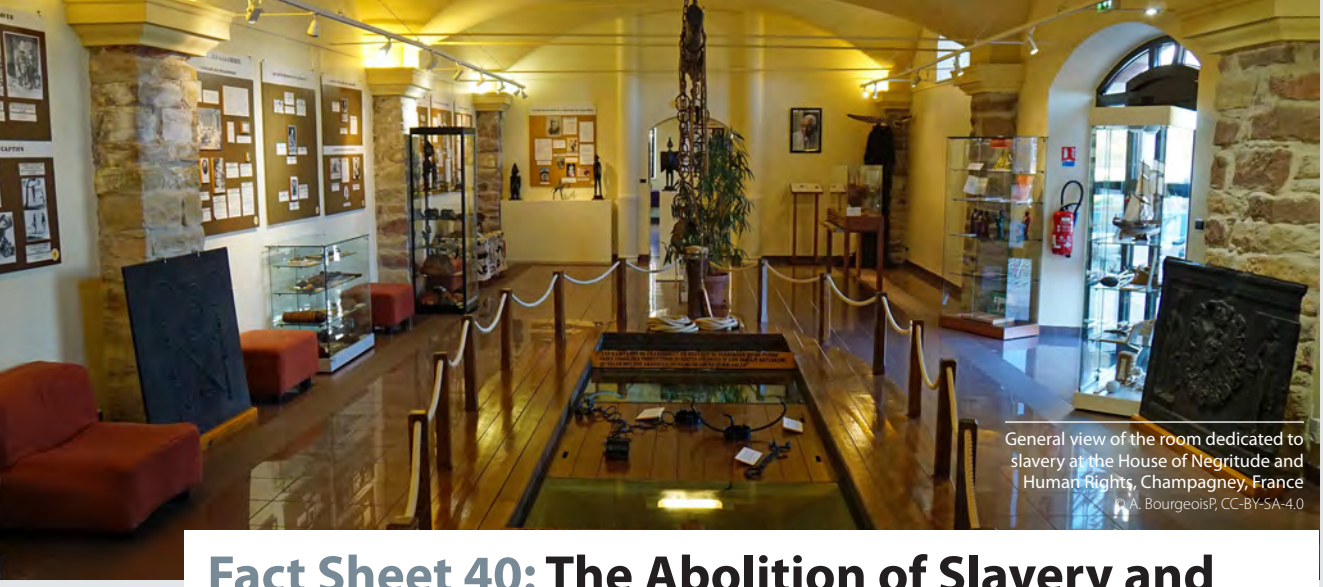
8. Bairro Alto, Santa Catarina, Poço dos Negros
9. Mocambo and its residents
10. From the Bairro to Travessa, from Mocambo to Madragoa

IV. From a colonial Lisbon to a Lisbon of freedom

11. From the debasement of Africans to the abolition of slavery
12. On the empire: from Belém to Bairro das Colónias
13. The Lisbon of democracy: the peripheral districts, the New Africans.

Contact:

Lisboa, Cidade Africana – Percursos e Lugares de Memória da Presença Africana
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General view of the room dedicated to slavery at the House of Negritude and Human Rights, Champagney, France
© A. BourgeoisP, CC-BY-SA-4.0

Fact Sheet 40: The Abolition of Slavery and Human Rights Route, France

■ BACKGROUND

A legacy of Enlightenment philosophy and Anglo-Saxon influences, the abolitionist movement in France had opened the debate on the question of slavery on the eve of the French Revolution; however, it took the triggering of the revolutionary process and the events in Saint-Domingue (where slavery was abolished in 1793 following the slaves' rebellion, which began in August 1791) for measures to be taken to end slavery. Slavery was abolished in the French colonies in 1794, but re-established by Napoleon Bonaparte in 1802, before an abolitionist movement resurfaced during the Restoration, starting in 1820 and culminating in the decree of 1848 abolishing slavery.

The 'Abolition of Slavery and Human Rights' Route is the first network of memorial sites and monuments linked to the history of slavery to be given a legal and financial structure in France. It was created locally following a law passed by the French parliament on 21 May 2001. The project was officially launched in 2004, as France's contribution to the United Nations International Year to Commemorate the Struggle against Slavery and its Abolition.

■ DESCRIPTION

The 'Abolition of Slavery and Human Rights' Route brings together five memorial sites and monuments located in eastern France:

1. **The Champagney House of Negritude** (Haute-Saône): on 19 March 1789, the inhabitants of Champagney formally requested King Louis XVI to abolish the slave trade and the enslavement of black people. A museum, a stele and the church preserve this history. In 1998, Champagney was declared a national site to mark the 150th anniversary of the abolition of slavery. Since 2000, the House of Negritude and Human Rights has been open to the public throughout the year. Although a memorial site, it is also a place of contemplation that invites visitors to reflect on human rights abuses in general. The House of Negritude and Human Rights works closely with the French Ministry of Education through the local education authority, the schools inspectorate and the secondary school in Champagney. Educational visits are organized for school pupils and an info[illegible] pack is sent to the teachers in advance of the visit. Special events are also organized for school gro[illegible]

These are mainly for primary and secondary school pupils in their 9th or 11th year of vocational education. Other subjects are also covered during guided visits, such as African history or topics relating to citizenship and heritage.

2. **The Abbé Grégoire House** (Emberménil, Meurthe-et-Moselle): The Abbé Grégoire House Museum honours the work of Abbé Henri Grégoire (1750-1831), a priest and politician renowned for vigorously advocating the abolition of privileges, universal suffrage, recognition of the rights of French Jews and the abolition of slavery in the French colonies. After slavery was re-established by Napoleon Bonaparte in 1802, Grégoire continued his work and his efforts to bring an end to bonded labour in the colonies and the illegal slave trade. He maintained regular correspondence with Toussaint Louverture and other Haitian leaders during the first three decades of the 19th century. Grégoire was a Member of the Society of the Friends of the Blacks, founded in 1788 by Jacques-Pierre Brissot, and the author of numerous books. His ashes were transferred to the Panthéon in 1989, in the bicentenary year of the French Revolution. In addition to the museum, the village has a number of steles commemorating the work of Abbé Grégoire**.** The site was opened to the public in 1995.
3. **Fort de Joux** (Doubs): Built in the 12th century, Fort de Joux served as a state prison from 1678 to 1815. It is to this prison that Toussaint Louverture was deported in 1802. Toussaint Louverture was the French army's first black general, the first black governor of a colony, the first leader of a successful slave rebellion and the father of the independence of the first black republic in history (the future Haiti). Born a slave on a plantation in the French colony of Saint-Domingue, he features in the history of mankind as a pioneer of the struggle for freedom, citizenship and self-determination of peoples. The site has been open to the public since 1958 and visitors can see the cell where Toussaint Louverture was incarcerated. It has been classified as a historic monument since 18 July 1996. Fort de Joux was the first site in France to engage in a commemorative initiative that has gathered momentum since 2003:

    1. 1901: the first plaque honouring the memory of Toussaint Louverture
    2. 1927: the first official ceremony in the presence of Colonel Nemours
    3. 1954: the first commemorative stele dedicated to Toussaint Louverture and visits by Haitians
    4. 1989: events celebrating the bicentenary of the French Revolution and the first Toussaint Louverture exhibition
    5. 2003: with the full support of the French president, commemoration of the bicentenary of the death of Toussaint Louverture
    6. Since 2003, every year on 7 April: an anniversary ceremony commemorating the death of Toussaint Louverture
    7. Since 2006, every year on 10 May: an official ceremony for the National Day of memory of the Slave Trade, Slavery and their Abolition.

4. **The Anne Marie Javouhey House** (Chamblanc, Côte d'Or): In 1838, Anne-Marie Javouhey, who founded the Congregation of the Sisters of Saint Joseph of Cluny, helped free 185 slaves on the Congregation's plantation in Mana, Guiana. In addition to Anne-Marie Javouhey's family home, located on the grounds of the lycée Anne-Marie Javouhey in Chamblanc, a walking trail retraces the main stages of the life of this missionary. In 2011, following genealogical research, 150 trees were planted in Chamblanc by the descendants of Guianese emancipated slaves in homage to their ancestors, as part of the commemoration and inauguration ceremony of this 'Memorial Forest'.
5. **The Victor Schœlcher House** (Fessenheim, Haut-Rhin): The building known as the 'Victor Schœlcher House' in Fessenheim comprises a museum and a stele. It has been open to the public since 1982, with a new museum space being added in 2013. In this old house dating from the 16th century, the life, work and struggles of Victor Schœlcher (1804-1893), president of the Commission for the Abolition of Slavery in the French Colonies in 1848, are described. The tour includes more than 150 images, original works (books, manuscripts and newspapers), period objects and pieces of porcelain produced by his father, Marc. The visit is complemented with touch tablets, audiovisual presentations and an interactive library.

Nationally, the Abolition of Slavery and Human Rights Route network enjoys the special support of five departments, four regions and several ministries including the Ministry of Foreign Affairs, the Ministry for Cooperation and the Ministry of Culture.

Its programme consists of:

- organizing ceremonies, events and commemorative occasions at local, national and international level (for example, the bicentenary of the death of Toussaint Louverture in 2003);
- engaging in public relations activities and extending invitations to prominent figures from politics, the arts and entertainment, and the national and international media;
- developing educational tools and organizing trips, as well as hosting educational and awareness-raising activities about the network to introduce schoolchildren to this aspect of history;
- developing promotional and informative materials such as brochures and websites;
- participating in meetings: organization of seminars, conferences and lectures related to this aspect of history;
- developing international cooperation concerning various memorial sites and monuments (French West Indies, Brazil, Haiti and Senegal).

Local projects also play a significant part in its activities:

- in **Champagney**: a complete upgrade of the present museum, with the addition of rooms for visiting schoolchildren, the creation of a resource and archive centre and the development of educational facilities, from 2012;
- in **Emberménil**: the development of collaboration with the Château de Lunéville on the theme of the Age of Enlightenment and the great philosophers associated with abolition;

- at **Fort de Joux**: renovation and enhancement of Fort de Joux (over the 2001-2015 period, more than US$25 million were invested to this end); an exhibition, a Toussaint Louverture memorial, a Toussaint Louverture and Haiti resource centre, the hosting of temporary collections, and participation in events and festivals;
- at the **Anne-Marie Javouhey House** in Côte d'Or: the development of theme-based spaces, the establishment of a Guiana-Brazil partnership, a travelling exhibition, educational activities, etc.;
- at the **Victor Schœlcher House** in Fessenheim: the creation, in 2013, of a new museum space, a travelling exhibition and the development of a visitor centre for schoolchildren.

The Abolition of Slavery and Human Rights Route is:

1. **A unique historical and memorial experience:** it presents the different stages of the abolitionist movement over the course of French history - 1789, 1794, 1802, 1838 and 1848 - and provides an overview of all the movements involved (including grassroots movements, revolutionaries, religious figures and slave rebellions).
2. **A practical and accessible itinerary:** the whole Route lies within a 200-kilometre radius and can be covered in two to three days.
3. **A pioneering network:** it was a pioneering initiative in the creation of networks and itineraries of memory linked to the history of slavery in France.
4. **A structured organization:** the sites are owned by like-minded local authorities that have come together to form an association of local authorities and politicians with its own resources and assistance from the French state.

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Museum of the New World, facade and garden of the hotel Fleuriau, France
© Julien Chauvet / Musée du Nouveau Monde

Fact Sheet 41: Museum of the New World, La Rochelle, France

■ BACKGROUND

Numerous colonists from La Rochelle settled in Saint-Domingue from the late 17th century to the early 18th century, and trade relations between the city and the island were intense and profitable. At the end of the 17th century, La Rochelle was the most important city on France's Atlantic coast for trade with the French colonies of the Caribbean and developed a significant slave trade, until it was superseded by Bordeaux and Nantes in the following century, although that change did not undermine its enrichment.

The Museum of the New World was planned and inaugurated in 1982 by Michel Crépeau, the mayor of La Rochelle at the time. The museum is located in a private mansion from the 18th century, named after the Fleuriau family who lived there from 1772 to 1974. Built by Jean Regnaud de Beaulieu between 1740 and 1750, inspired by the Parisian style - a central body framed by two wings around a courtyard enclosed with a large gate - it was purchased in 1772 by Aimé-Benjamin Fleuriau (1709-1787), whose wealth had come from his plantation in Saint-Domingue. A few years later, around 1780, through the acquisition of a plot fronting the parallel street, the mansion was enlarged with a new construction adjoining the original building, opening onto a garden and connected internally by door openings on each half floor. The museum is entered via the main courtyard in a Louis XV style mansion, while the opposite façade is neoclassical, a stylistic difference reflected by the interior décor which has been largely preserved.

Stakeholders involved in the project:

< La Rochelle City Council, conservation of museums of art and history

■ DESCRIPTION

In this building, symbolizing the links established between La Rochelle and Saint-Domingue (present-day Haiti), the collections show the importance the transatlantic slave trade had for creating the wealth of La Rochelle in the 18th century, making this museum a source of knowledge and a place for thinking about history.

- Spaces: 1,000 hectares
- Collections: approximately 200 to 300 pieces linked to slavery and the Caribbean
- Monuments/plaques/memorial elements added to the site: statue of Toussaint Louverture by O. Sow (2015); information plaque
- Specific signage: plaques, audio guides and educational documentation
- Ancillary services (archives, library, cafeteria, etc.): documentation centre accessible by appointment, bookshop
- Events: regular conferences and exhibitions
- Support tools developed: guided tours, audio guides, teaching materials
- Staff (full time, part time, volunteers): 1 curator, 2 cultural mediation officers
- Number of annual visitors: *20,000*
- Types of audiences: the general public.

The museum is a place of reference for La Rochelle's involvement in the slave trade thanks to the quality of its collections and building. It has an active policy of organizing exhibitions and conferences on the subjects of the slave trade, slavery and abolition, as well as actively targeting school groups.

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Mascaron à "tête de nègre", Place de la Bourse, Bordeaux, France
© Langladure, CC-BY-SA 3.0

Fact Sheet 42: The 'Bordeaux Nègre' tourist trail, Bordeaux, France

■ BACKGROUND

Between the 16th and 19th centuries, more than 150,000 African captives were transported on ships from Bordeaux. Trade in goods from the Caribbean colonies, Guadeloupe, Martinique, Guiana and especially Saint-Domingue (the latter until 1803), also enriched the city, particularly in the late 18th century, when the transatlantic slave trade from the African coast was at its height. The trafficking of slaves continued in Bordeaux, as it did in many other European ports, after the slave trade was prohibited.

For the period between 1685 and 1826, historians have listed 186 Bordeaux shipowners who were directly involved in this trade, especially with Saint-Domingue, allowing them to make considerable fortunes.

■ DESCRIPTION

The mission of the Mémoires & Partages (memory and Sharing) association is to actively participate in the development of a pluralistic memory based on a critical look at the history of the city and highlighting the contribution of deported slaves and their descendants to the defence and promotion of humanistic values. This association's most emblematic activity is the 'Bordeaux Nègre' (Black Bordeaux) guided tour.

This guided tour, which was begun by Martinican writer Patrick Chamoiseau, was inspired by the first memory tour organized on the transatlantic slave trade in France. From 2005 to 2008, DiversCités, an association based in Bordeaux, organized a cultural event called 'A moment of slavery', designed as an artistic performance to raise awareness in the streets of a city that was insufficiently informed about its history. After the performance became an event, Mémoires & Partages decided to make the concept a more permanent fixture, proposing it in the form of a guided tour which has been offered throughout the year since the 2012 Heritage Days.

Moreover, since 2006, this aspect of humanity's history has a reserved space at the Regional History Museum of Aquitaine.

This original tour has been described by its creator, Karfa Sira Diallo, as: 'A moment to look at the history of the black slave trade and slavery, a time to grasp the horror of that crime, and a way to transmit the cultures and civilisations born of that huge upheaval, so as to make this memory a resource for individual and collective growth'.

Very different from a formal tour or classic guided excursion, the 'Bordeaux Nègre' trail is an invitation to stroll through the tangible and intangible memory of the French cit. Private mansions, street signs, mascarons, boats, official buildings, museums, squares, graveyards, wineries, bridges, warehouses, churches, slave prisons and cultural sites all serve as tangible supports for a walking tour that guides enliven with anecdotes, weaving background stories into the tragic encounter of peoples thrown together. This walk calls to mind the universal history of freedom, slavery and exploitation, but also of the resistance and creativity born of that encounter.

Consisting of six parts, this guided tour recounts the history of the meeting between Europe, Africa and the Americas. Architectural traces support each part to evoke the history of the slave trade and slavery, from the ship's hold to sites of resistance across the Atlantic.

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Panel No.1 of the educational exhibition of the Shackles of Memory Association, France – 2008 version
© Association les Anneaux de la Mémoire

Fact Sheet 43: The Shackles of Memory Association and Alliance, Nantes, France

■ BACKGROUND

Nantes was the most important slave port in France between the 17th and 19th centuries, with the city's shipowners organizing 1,744 slave-trading expeditions, 41.3% of the total number for the whole of France. The three cities that followed Nantes, in order of importance, were Le Havre, La Rochelle and Bordeaux, accounting for 33.5% of expeditions.

In 1985, after a long period of neglect, Nantes began a process of gradually acknowledging its past and its involvement in the slave trade when Nantes University welcomed historians from around the world to a conference entitled 'From the Slave Trade to Slavery'. In 1991, the Shackles of memory Association was founded. In 1992, 'The Shackles of memory' exhibition attracted more than 400,000 visitors, and enabled a broader, less specialized audience to understand and analyse these historical facts. In 2012, a Memorial to the Abolition of Slavery was inaugurated in Nantes.

■ DESCRIPTION

The Shackles of memory Association is the driving force behind numerous cultural activities such as exhibitions, both in France and abroad, international conferences and seminars, publications, and educational events. In addition, it contributes operational support to projects and policies for the development of culture and tourism, both through its own members and through its international partners. Its objective is to familiarize the general public with the history of the slave trade and slavery but also the present-day consequences of these phenomena, with the ultimate goal of promoting new exchanges, on a fairer and more equal footing, between the societies of Africa, the Americas and Europe.

The Association has created:

1. A resource centre.

2. **Educational materials:** a) an educational exhibition 'The Shackles of memory' (13 theme-based display panels); b) a travelling exhibition 'From Ayiti to Haiti, freedom won' (31 display panels), in association with the Musée du Panthéon National Haïtien (MUPANAH), in French and Creole, which is available for hire; c) teaching packs with workbooks, produced for schools and teachers, with each pack containing multimedia resources and documents aimed at pupils from age eight to late secondary level. The workbook, *De Nantes aux Antilles, sur les routes des esclaves* (From Nantes to the Caribbean, following the Slave Route)[1], published in 2012, consists of four printed, theme-based worksheets and a printed vocabulary sheet, plus a CD ROM with the worksheets in electronic format, supplemented by other texts and illustrations. There is also a film about the voyage, in 1815, of a ship called the 'Bonne-Mère' with its cargo of slaves; a book of illustrations and a book of maps; a high-definition scan of the logbook of the Bonne-Mère; and a list of websites with resources on the subject of slavery.
3. **A journal**, *Les Cahiers des Anneaux de la Mémoire*, in French, published since 1999 and containing multidisciplinary articles by scholars of international standing. Sixteen thematic issues of the journal have been published to date.

In 2003, in partnership with the **University of Nantes**, the Association created a study centre - the Centre d'études des Anneaux de la Mémoire (CEAM) - to develop and disseminate research on the transatlantic slave trade as well as on the different types of trafficking and forms of slavery that have existed (or still exist) around the world. To this end, until 2013, the Association organized a series of talks that were open to everyone, as well as international gatherings aimed at developing transcontinental relations and ventures between Africa, the Americas and Europe.

Since 2009, with the support of the International Organisation of la Francophonie (Fonds francophone des Inforoutes), the Shackles of memory Association has a website and an internet platform that includes an online resource centre.

The Shackles of memory International Alliance was created in November 2005, at the General Assembly of the International Association of Francophone Mayors (AIMF) in Antananarivo, Madagascar. It was initiated by mayors from Africa, the Americas and Europe and representatives of the city of Nantes and the Shackles of memory Association itself. Made up of a variety of stakeholders from the three continents sharing an interest in the history of the slave trade and slavery (Africa, the Americas and Europe), the network's aim is to share knowledge on these subjects, to work together in pursuing the study of this shared past in greater depth and to set up practical development and cultural mediation projects (exhibitions, museums, seminars and publications). Initially, the members of the Shackles of memory International Alliance were cities in Europe, Africa and the Americas eager to exchange their knowledge and points of view of the transatlantic slave trade. Today, the Alliance is open to other actors such as associations, cultural institutions and individuals from the three Atlantic continents, as well as from the Indian Ocean.

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1 Association Les Anneaux de la mémoire. De Nantes aux Antilles, sur les routes des esclaves [CD-ROOM]. Nantes, Anneaux de la mémoire, 2012

III – NEW MUSEUMS



International Slavery Museum, Liverpool, United Kingdom
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Fact Sheet 44: International Slavery Museum, Liverpool, United Kingdom

■ BACKGROUND

In the 1780s, Liverpool was considered the European capital of the transatlantic slave trade. The considerable profits from this trade contributed to making it one of the largest and richest cities in Great Britain. While other British ports, such as London and Bristol, were also heavily involved in the transatlantic slave trade, some 5,000 slave ship voyages were undertaken from Liverpool. In 1795, Liverpool controlled around 80% of the British transatlantic slave trade and about 40% of the European transatlantic slave trade.

Thus, Liverpool was the epicentre of the transatlantic slave trade during the 18th century. Liverpool's International Slavery Museum is located within the Merseyside Maritime Museum, on Albert Dock. Liverpool's shipping docks have been on the UNESCO World Heritage List since 2004.

The International Slavery Museum opened on 23 August 2007, the International Day for the memory of the Slave Trade and its Abolition, to mark the bicentenary of the year the slave trade was outlawed by the Parliament of the United Kingdom.

■ DESCRIPTION

In opening a gallery devoted to the transatlantic slave trade - the first of its kind in the world - inside the Merseyside Maritime Museum in 1994, the National Museums Liverpool group sought to draw attention to the importance of this tragic period in British history.

The museum's audience is diverse: scholars, primary- and secondary-school pupils, doctoral students, historians, individuals from the immediate locality and the wider area, and British and foreign tourists. With regard to schoolchildren, the museum houses the Anthony Walker Education Centre, offering an educational programme tailored specifically for 7 to14 year-olds. The museum also offers a wide range of activities and services for all age groups, such as the publication of a newsletter and, more recently, of its lavishly illustrated catalogue, in addition to a regularly updated website and various social networks.

Setting up partnerships, at international as well as national and local levels, is at the core of the museum's strategic plan. At the international level: UNESCO, for logistic and promotional support; at the national level: the Department for Culture, Media and Sport for funding, Anti-Slavery International for promotion and the staff of the country's schools and universities, such as Edge Hill University; and at the local level: Liverpool City Council for funding and staffing, the St James Heritage Project, Stop the Traffic, Active Communities against Trafficking (ACT) for promotion, as well as the city of Liverpool's primary and secondary schools, not forgetting its university, under the umbrella of the Centre for the Study of International Slavery.

In 2010, the Liverpool International Slavery Museum coordinated a new initiative, the creation of a Federation of International Human Rights Museums (FIHRM; http://www.fihrm.org/).

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Mémorial ACTe, Guadeloupe, France
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Fact Sheet 45: Mémorial ACTe, Guadeloupe, France

■ BACKGROUND

The Mémorial ACTe project is a response to the commitment expressed by the Regional Council, in its in-depth policy address of 26 October 2004, to participate in preserving the collective memory of and to encourage research on the slave trade, slavery and their abolition. It is a way for the local authorities to contribute, through knowledge, culture and creation, to healing the wounds of a past that has greatly impacted the development of not only Guadeloupean society, but also the societies of the Caribbean and the Americas, by giving the general public access to a historical information and research space on the subject of the slave trade and slavery. With this project of international scope, the Guadeloupe Regional Council wished to demonstrate its determination to denounce all forms of slavery, whether past or present, by creating an open space dedicated to the fight against oppression and illustrating the struggles for freedom. That was the original idea of the International Committee of Black Peoples (CIPN) for a memorial, whose scientific and cultural project was validated in May 2007 by the Scientific Committee, the Steering Committee and the Regional Assembly.

■ DESCRIPTION

The initial location near the airport was judiciously changed to the site of the former Darboussier sugar refinery in Pointe-à-Pitre, which was the largest sugar production unit in the Lesser Antilles, on the seafront by the port. It is a symbolic site with direct links to the slave trade and slavery.

Inaugurated by the French President in May 2015, the architecture of Mémorial ACTe - the Caribbean Centre of Expression and memory of Slavery and the Slave Trade - is unique in the Caribbean.

Educational and accessible, Mémorial ACTe offers several spaces of discovery:

- a permanent exhibition extending over an area of 1,700 sq. metres;
- a space dedicated to contemporary artistic expression during temporary exhibitions;
- a panoramic garden, Morne Mémoire (memory Hill) Park, with views of the ocean, the mountains of Basse-Terre and Pointe-à-Pitre bay;

- a monumental footbridge (12 metres high and 275 metres long) connecting Morne Mémoire Park to the rest of the complex.

The permanent exhibition has a multilingual design (French, Creole, Spanish and English) and incorporates multimedia content. Through 39 teaching modules called 'islands', grouped into 6 'archipelagos', the exhibition guides visitors through the periods from Antiquity to 1492, from post-Columbian slavery to its abolition, from colonial times to independence and up to the present day:

1. The Americas
2. Towards slavery and the slave trade
3. The slavery period
4. Abolition
5. Post-abolition and segregation
6. Today

Through its programme, Mémorial ACTe contributes to exchange and debate, as well as the development of research and information for the general public with a series of lectures entitled 'Rencontres Mémorial-ACTe' addressing topics related to the global history of slavery and the slave trade, the specific experience of the Caribbean, culture and contemporary arts.

Each year, Mémorial ACTe puts on two temporary exhibitions on themes developed through colloquia, seminars, lectures and round table discussions, which are open to the public and aim to contribute to increasing knowledge of the issues raised and to shed light on some of their more obscure aspects through research. The first international colloquium at Mémorial ACTe took place from 20 to 24 November 2012 on the topic 'Slavery: history, memories, narratives and creation'.

Master classes for Master's students, young researchers and higher-education teachers are also organized depending on the programming, and can encompass several lecture series.

The digital media library has online resources, including several databases linked to the research themes, and focuses on the Caribbean Centre of Expression and memory of Slavery and the Slave Trade. In the documentary resource centre, users can consult a collection centred on the history of slavery, the slave trade and art. It is open to academics, historians and researchers, as well as the general public.

Mémorial ACTe runs a genealogical research workshop on the practice of genealogy. Workshop participants can trace their family trees based on family names from Guadeloupe and Martinique. They register upon arrival and, under the guidance of support staff, begin building their family trees using genealogy software. They can also search external resources such as the National Overseas Archives, the Departmental Archives and the Martinique Heritage Database. This workshop provides an opportunity to go back through family memory, remember inter-generational exchanges, and start or continue tracing back one's ancestors.

A cultural mediation service, in collaboration with the education service, prepares teaching materials and activities to develop the main themes of the museum's permanent and temporary exhibitions and artistic and cultural programme. Educational booklets, visit sheets, audio guides in several languages and other mediation actions geared towards schoolchildren and the general public offer support and access to the site's specific editorial policy.

A shop, snack bar and gourmet restaurant make this a lively and welcoming venue. An outdoor terrace is used for events and receptions throughout the year.

Approximately 150,000 visitors a year are expected, excluding use of the site for recreational activities and walks.

Mémorial ACTe is designed as a place for building a collective memory of slavery and the slave trade, a space for the Guadeloupean population to assimilate the wealth and diversity of its history, and a centre for knowledge, historical reading and meetings, open to the Caribbean and connected with the world's major museums. It is a resolutely forward-looking multi-purpose space for sharing knowledge and practices linked to Afro-Caribbean cultural heritage and diverse expressions of contemporary art. The site has a monumental architectural footprint. The originality of the site lies in its multi-faceted, multi-sensory approach, while its presentations are brought alive by the variety of media used, including film, artistic installations, performance, sounds, models and authentic objects. Around 30 advisors, most of them academics and researchers, document and assist with the scientific content of the teaching modules. Three contemporary art curators studied and put forward for selection by the local authorities 20 contemporary works of art for inclusion in the permanent exhibition.

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National Museum of African American History and Culture, Washington DC, United States
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Fact Sheet 46: National Museum of African American History and Culture (NMAAHC),

Smithsonian Institution, Washington DC, United States

■ BACKGROUND

When the initiative began to take shape to create the museum on the National Mall in Washington DC, near the Washington Monument, the Smithsonian Institution's ambitious plan was to establish a place of discovery, history and memory, a place of connection between the United States and its past to make it present and alive through a vast, abundant and coherent collection. For some, African American history serves as a revealing lens through which to view American history.

A huge step was taken in September 2016 when the National Museum of African American History and Culture was opened in Washington, more than a century after College Museum, the country's first national African American history museum, which opened in Hampton, Virginia, in 1868 on the campus of Hampton Institute. Other establishments had been opened since then, in Cleveland (Ohio) in 1953 and Wilberforce (Ohio) in 1988. The Charles H Wright Museum of African American History opened in Detroit in 1997. Due to budgetary constraints in Congress, the museum project conceived by the Smithsonian Institution was delayed, and it was not until 2006 that the Smithsonian was able to announce the upcoming construction of NMAAHC in the centre of Washington.

The external architectural form of the building is inspired by the crown of a statue by the Yoruba artist Olowe of Ise (circa 1873 - circa 1938). The overall cost of building and fitting out the museum was US$540 million. Private financial support received for the project includes a donation from the television talk show host Oprah Winfrey and considerable fundraising carried out by the actor Denzel Washington.

■ DESCRIPTION

The museum presents six centuries of history. The project's designers considered that the museum's collection of more than 36,000 exhibited pieces would make it possible to recount the nation's history through the African American prism.

The museum's design is based on four pillars: 1/ it provides an exceptional opportunity for those interested in African American culture to explore this history through interactive exhibitions; 2/ it aims to gauge the ties forged between the peoples of the United States over the course of history; 3/ it explores the meaning of values like resilience and spirituality in African American history and culture; and 4/ it serves as a place of collaboration with museums and educational institutions that have given themselves the mission of preserving and promoting this history.

The basement level provides a chronology encompassing the beginnings of slavery, examples of slave resistance, the abolition of slavery and the long century of segregation that followed, up to the civil rights struggles of the 20th century. The remaining floors are dedicated to African American contributions to the cultures of the United States and the world.

The Middle Passage process is portrayed through items salvaged from a late-18th-century Portuguese slave ship, the São José, which sank off the coast of South Africa in 1794, including a slave ship whip, and chains, irons and shackles from the hold. The space dedicated to survival on the plantations contains a slave hut and several objects from work and daily life. The Bible that Nat Turner, who led a slave rebellion in Southampton County, Virginia, in 1831, is said to have been carrying at the time of his arrest, and the dagger of John Brown, leader of the raid on Harpers Ferry, Virginia, in 1859, are some the key pieces in this part of the museum.

The space dedicated to the slavery abolition period gives pride of place to a shawl given to Harriet Tubman, a former fugitive slave who was very active in the Underground Railroad during the 19th century, by Queen Victoria in 1897, as well as Frederick Douglass' walking stick. The post-abolition era and the long period of segregation are represented by the long scarlet robe of a Ku Klux Klan officer dating from shortly after World War I and a wall listing the names of over 2,200 people who were lynched between 1882 and 1930. The room also contains a 'segregation wagon', showing the specific arrangements for black and white passengers. The final stage, 'A Changing America: 1968 and Beyond' recalls the ongoing discrimination and key contributors to the civil rights movement, such as the Black Panthers, the Nation of Islam, the activism of Malcolm X and Martin Luther King, the Black Arts Movement, and the consequences of the Vietnam War.

A dress designed by Rosa Parks, donated by the Black Fashion Museum, is exhibited along with statues showing the athletes Tommie Smith and John Carlos with their fists raised in the Black Power salute as the American national anthem played in honour of their victory at the Mexico Olympic Games in 1968, and the Olympic torch carried by Rafer Johnson at the Los Angeles Olympics in 1984. James Baldwin's passport and a pair of boxing gloves worn by Muhammad Ali lead to the rooms dedicated to the period from 1968 to the present day, where more recent events such as the election of President Barack Obama are covered and a 'Black Lives Matter' t-shirt is displayed.

The galleries on the upper floors are dedicated to African American cultural history, the contributions and achievements of African Americans in fields as diverse as teaching, the humanities, social and political science, science, visual arts, music, literature, theatre, and audiovisual and cinematographic creation. The objective is to highlight their numerous contributions to the construction of the United States in the areas of economics, government, the military, culture and sport.

There is also a room dedicated to genealogical research and another for accessing various media.

Music also has a place in the museum, not only through references to African American musical history, musicians, composers and instrumentalists, but also thanks to the Oprah Winfrey Theater, which is located in the basement of the building and has a varied programme of concerts and cultural events each month.

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GLOSSARY

- **Abolition of slavery**: act that declares the system of slavery, its rules and the servitude to which slaves are subjected illegal and prohibited. Abolitionism was a movement that first emerged towards the end of the seventeenth century in the Western world, which condemned, and then fought to abolish, slavery. The term abolitionist refers to a supporter of the abolition of slavery. Most abolitionists also proposed ways to reform the colonial system.

- **Anti-slavery**: used to describe an opposition to the slavery system on moral, religious or political grounds. Those who adopted this position did not necessarily propose reforms to the system.

- **Asiento (dos Negros)**: monopoly over the transatlantic slave trade that was granted under a contractual agreement first to the Portuguese, and then to the Dutch, the French and the English, in return for the payment of a licence fee to the Spanish authorities. The system enabled Spain, which was unable to trade along the coast of West Africa under the Treaty of Tordesillas, to supply its colonies with slave labour from Africa. It would continue until the 1720s.

- **Captive**: this word originates from the Latin *captivus*, from the verb *capere*, to take. It is used to describe a person captured during a raid or taken as a prisoner of war. In the history of slavery, captives became slaves when they were sold to a person who would become their owner.

- **Code noir, Slave Laws, Slave Code, Código negro**: texts in which European governments laid down the essential rules of slavery in their colonies in the Caribbean and the Americas and in the Indian Ocean from the end of the seventeenth century to the end of the eighteenth century. The texts stipulated the status of slaves, the restrictions on their liberties, the obligations of enslaved persons to their owners and a small number of responsibilities imposed on slave owners.

- **Congress of Vienna (1815)**: during the congress, the leading European powers opposed to the Napoleonic Empire (the United Kingdom of Great Britain and Ireland, Russian Empire, United Kingdoms of Sweden and of Norway, Kingdom of France, Kingdom of Spain, Kingdom of Portugal, Kingdom of Prussia and Austrian Empire) agreed, in the 8 February 1815 declaration, to take measures to stop the trafficking of humans from the coasts of Africa. Slave trading continued illegally and covertly until the end of the nineteenth century.

- **Crime against humanity**: the expression, which was first defined at an international level in the wake of the Second World War (see Article 6(c) of the Charter of the International Military Tribunal in Nuremburg), designates four groups of crimes: genocide; deportation, enslavement, execution, kidnapping and torture when executed massively and systematically; crimes against humanity committed against combatants in times of war; complicity in such crimes when executing concerted actions. With regards to human trafficking and slavery, the notion of crimes against humanity was first introduced at the end of the seventeenth century by British and North American Quakers such as Anthony Benezet and Benjamin Rush, and subsequently in the eighteenth century by individuals such as Condorcet, Chevalier Louis de Jaucourt (Diderot's *Encyclopaedia*), Abbé Grégoire, Thomas Clarkson, William Wilberforce, the cosignatories of the Haitian Declaration of Independence that rejected all submission to the "inhuman government" of France (1 January 1804), by William L. Garrison in the 1830s and then Frederick Douglass in the United States and Victor Schœlcher in France, who believed that the abolition of slavery in the French colonies in 1848 would be "reparation" for a "crime injuring humanity". The trade in human beings and slavery were described as "crimes against humanity" by the United Nations World Conference against Racism, Racial Discrimination, Xenophobia and Related Into[435] that took place in Durban, South Africa.

- **Deportation**: the forced transportation of an individual or group of individuals from one country or continent to another under duress.

- **Trading forts**: fortified trading posts were erected along most of the West African coast from Senegambia to Angola. They served as trading centres, as holding pens for captives – and other merchandise – as well as defence posts. Furthermore, they represented a first attempt at European supremacy along the West African coast. These coastal regions were called the Grain Coast (Sierra Leone, Liberia), the Ivory Coast (Côte d'Ivoire), the Slave Coast (Benin, Togo, Nigeria), the Gold Coast (Ghana), South-East Nigeria, Cameroon, Equatorial Guinea, Gabon, Congo and Angola.

  The forts of Arguin, which was the first to be built in 1555 by the Portuguese (today's Mauritania), N'dar, Albreda, Saint James, Gorée (Senegal), Cacheo, Bissau (today's Guinea-Bissau), and of Elmina, Axim, Ruychaver, Aboasi, Carolusborg, which was built by the Swedish Africa Company, Cape Coast Castle (Gold Coast, today's Ghana), Ouidah (today's Benin) and the two Danish forts of Christiansborg and Friedrichsburg (Ghana) were, for example, at the heart of European rivalries to dominate this human trafficking and to attempt – in vain – to take over and colonize the continent's inland territories.

- **Freed slave**: an enslaved person who had been freed by his or her owner or on a governor's orders. Emancipation was an act that gave an enslaved person his or her freedom and was formalized in a notarial deed that was subject to charges. Most acts of emancipation were, however, granted tacitly only by slaveholders who did not pay the freedom duties on their technically "free" slaves. The term manumission (from the Latin *manumissio*: freedom) was also used, particularly in British and Spanish colonies.

- **ICOM, International Council of Museums** established in 1946, is the leading international non-governmental organization for museums and museum professionals. The Council's main objectives are the development of cooperation and scientific exchanges between museums, and the protection of the existing and future tangible and intangible cultural and natural heritage.

- **ICOMOS, International Council on Monuments and Sites**, is an international non-governmental organization working to protect cultural heritage monuments and sites throughout the world. It was founded in 1965.

- **Indentured, indentured labour**: these terms have had two meanings in history. In the seventeenth and eighteenth centuries the word "indenture" referred to European workers who signed indentures for three years to work as farm labourers or artisans in the French and English colonies. Once their indentures had expired, they were free to settle permanently in the colonies and were given a plot of land to develop. In the nineteenth century, the term "indentured servitude" described the practice of bringing free indentured labourers to colonies that had recently abolished slavery and were experiencing labour shortages. Most of these labourers came from India.

- **International Decade for People of African Descent, United Nations, 2015-2024**: "Under the theme of "People of African Descent: recognition, justice and development", the Decade also symbolizes the international community's determination to reveal the history, the memory and the contemporary implications of slavery across the globe. It offers an occasion to reflect upon the dehumanization and deportation of millions of human beings, but also upon resistance which enabled to redefine the very notions of humanity, dignity, citizenship, equity and freedom.

The main objectives of the International Decade are as follows:

1. Promote respect, protection and fulfilment of all hu[436]ghts and fundamental freedoms of people of African Descent, as recognized in the Universal Declaration of Human Rights;

2. Promote a greater knowledge of and respect for the diverse heritage, culture and contribution of people of African descent to the development of societies;

3. Adopt and strengthen national, regional and international legal frameworks according to the Durban Declaration and Programme of Action and the International Convention on the Elimination of All Forms of Racial Discrimination and to ensure their full and effective implementation."

– **Maroon, marooning**: the "maroon" was a runaway slave who had escaped from the plantation or mine to which he or she had "belonged". Marooning occurred right from the very beginning of the colonization of the islands and continental territories of the Caribbean and the Americas. A "maroon" could live as a fugitive for several days or even several months if he or she was not recaptured during the searches or "maroon" hunts that were common throughout these colonies. Some remained hidden for years, or even until the end of their lives, if they were able to find refuge in one of the fortified shelters known as Palenque in the Spanish colonies, *quilombo* in Brazil, *grand camps* in the French and British Caribbean island colonies and *cumbes* in Venezuela. In Brazil, the Quilombola are inhabitants of the quilombos and the communities that have descended from them. In Dutch Guyana (Suriname), maroons were known as "boschneger" (forest negro), which then became "bushinengue".

– **Negro**: this term was used both in the colonies and by slave ship owners to refer to captives and enslaved people of African origin. Often perceived as controversial and derogatory, the connotation and meaning of the word *Negro* have evolved through the work of historians and writers who have reclaimed it in recognition of its profound historical significance: the *Negro* is a person – or the descendant of a person – who was deported from Africa and enslaved. The Francophone intellectuals Aimé Césaire, Léon-Gontran Damas and Léopold Sédar Senghor, for example, coined the term "Negritude" and laid claim to the sense of identity contained in the word.

– **Newly freed (nouveau libre)**: term used to describe the slaves freed in 1848 in Guadeloupe, Martinique, French Guiana and La Réunion.

– **Office of the United Nations High Commissioner for Human Rights** is a United Nations agency based in Geneva that works to promote, monitor and report on the respect of international human rights law and international humanitarian law in the world, according to the Vienna Declaration and Programme of Action adopted at the 1993 World Conference on Human Rights. It is the lead agency of the International Decade for People of African Descent (2015-2024).

– **Plantation**: large agricultural property of varying sizes with from about ten to several hundred slaves. A plantation was usually specialized in a single cash crop such as sugar, coffee, cotton, indigo or tobacco.

– **Quilombo**: fortified refuge built by fugitive slaves in Brazil from the sixteenth century. The word originates from "kilombo", large fortified camps in Africa, particularly in Angola, which were surrounded by large wooden palisades and could contain one or several villages. The Angolares people – shipwrecked Angolan captives who settled on São Tomé – established a kilombo in the island's mountains. The Portuguese launched offenses against them for several decades.

– **Razzia**: armed raid on the African continent to capture prisoners who would be sold as captives.

– **Reparation**: term describing all the means of compensating the descendants of the captives and enslaved people of African origin deported to the Caribbean and the Americas from the sixteenth to the nineteenth centuries for the crimes committed against them. Deportation and slavery were described as "crimes against humanity" by the 2001 United Nations World Conference against Racism, Racial Discrimination, Xenophobia and Related Intolerance

in Durban, South Africa. Reparation can take several forms: historical, educational, economic or financial. During abolition, slave owners were compensated for the loss of "their property" rather than those who had suffered the horrors of slavery.

- **Resistance**: the resistance of captives began right from the moment they had been captured on the African continent and continued while they were held in the forts and holding pens (*barracoons*) along the coast and on the slave ships, as they were embarked and during the voyage. On the plantations, the non-acceptance of enslavement took different forms from individual resistance (refusal to work, sabotage, poisoning of livestock or people, infanticide, suicide) to collective resistance in a constant series of revolts which began in the very first months of colonial settlement.

- **Site, place and itinerary of memory**: a ***site*** of memory is a place, a geographical area, where one or more memorable or symbolic events have taken place – of spiritual, religious or cultural value – that a community decides to commemorate, that is, that it wishes to remember collectively. Architectural or archaeological remains may bear witness to such events, as may evocative landscapes. A ***place*** of memory is more specifically related to certain important historic events, which have been commemorated in the form of a museum, a memorial or a monument. ***Itineraries*** of memory connect the different sites and places related to a given historical phenomenon, for example, the routes and ports of call for human trafficking, slavery, and places related to the history of abolition. Some sites have been included in the UNESCO World Heritage List for their "outstanding universal value". ***Sites of conscience*** – a term that emerged in the 1990s – are sites of memory predominantly related to events that took place in recent history and incite visitors to reflect on their contemporary implications. The International Coalition of Sites of Conscience (ICSC) is a worldwide network of Sites of Conscience – historic sites, museums and memory initiatives. Its main objective is to engage the public in a deeper understanding of the past and inspire action to shape a just future. (ICOM website)

- **Slave ship owner**: ship owners who financed slaving voyages on private vessels, including the recruitment of the captain and crew and the provisions required. They also organized commercial negotiations, determined destinations and ports of call and negotiated insurance.

- **Slave ship**: ship that was used to transport captives being deported from Africa.

- **Slave**: it is thought that this term originates from *slave* (*slavus* in Latin) that was used to describe the people from central and Eastern Europe who were enslaved and sold in the Middle East and North Africa. It describes a person who is not free, who is not paid for the work he does and who is deprived of all his rights. There is some controversy over the term today as it describes a condition at the expense of a historical process. It suggests the existence of a natural condition, and entirely neglects the process of using violence to enslave free human beings. The terms "enslaved person" and "enslavement" are increasingly preferred.

- **Slavery**: this term refers to the deprivation of a person's liberty and the submission and dependence to which an enslaved person is subjected.

- **The Slave Route**: Resistance, Liberty, Heritage: Launched in 1994 in Ouidah, Benin, on a proposal from Haiti, UNESCO's *Slave Route* Project pursues the following objectives:

  "– Contribute to a better understanding of the causes, forms of operation, stakes and consequences of slavery and the slave trade in the world (Africa, Europe, the Americas, the Caribbean, the Indian Ocean, Middle East and Asia);

- Highlight the global transformations and cultural interactions that have resulted from this history;
- Contribute to a culture of peace by promoting reflection on cultural pluralism, intercultural dialogue and the construction of new identities and citizenships."

Important progress has been made through research and international dialogue between researchers and the regular diffusion of educational materials for use by pupils and teachers (consult the programme website).

- **The United Nations Educational, Scientific and Cultural Organization, UNESCO**, is a specialized agency of the United Nations that was established on 16 November 1945 in London. The Organization's Headquarters are in Paris. According the UNESCO Constitution, one of the Organization's most important goals is to "contribute to peace and security by promoting collaboration among the nations through education, science and culture in order to further universal respect for justice, for the rule of law and for the human rights and fundamental freedoms which are affirmed for the peoples of the world, without distinction of race, sex, language or religion, by the Charter of the United Nations." In 1964, UNESCO launched the *General History of Africa* project, and in 1994, the *Slave Route Project*.
- **Slave Trade**: from the Latin *tradere*: give back, transmit, trade, deliver. (Cicero used the expression *"livrer un esclave* [deliver a slave]", *Dictionnaire Gaffiot*). The expression "slave trade" is today challenged as colonial terminology to be deconstructed, with "trafficking in human beings" proposed as an alternative.
- **Underground Railroad**: a network of secret routes used by enslaved people fleeing the Southern states of the United States of America to seek refuge in the Northern states and in Canada with help from abolitionists who supported their cause. Harriet Tubman and Frederick Douglass, themselves former slaves, were the most famous of the abolitionists who accompanied these fugitives on their journey to freedom.
- **World Heritage**: designates a collection of cultural, material and natural sites of outstanding interest for the common heritage of humanity. The list of cultural properties is updated every year by the UNESCO World Heritage Committee.

ADDITIONAL INFORMATION



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Qualitative criteria for granting the UNESCO label 'Site of memory associated with the UNESCO Slave Route Project'

In order to be awarded the Slave Route Site label created by the Slave Route Project in 2013, sites and itineraries of memory must meet the following criteria.

- **Originality of the site**. The site must illustrate the diverse range of places linked to the slave trade, slavery, resistance and abolition, such as: work and agro-industrial production sites; places of mistreatment, imprisonment or concentration; sites of resistance and Maroon communities; commemoration sites; places of cultural expression; graveyards; places of ritual; and buildings constructed by slaves. The aim is to avoid the predominance of one type of site and to give priority to honouring the memory of the victims and the contributions of enslaved persons to the development of societies.
- **The scientific relevance of the information about the site and its link with the theme of slavery**. The identification and choice of the site must be based on a thorough, documented study. The site must be scientifically established by historical research (history work) and recognized by the communities concerned (memory work). Information about the site should be gathered from four types of sources: a) written documents; b) oral traditions (including songs, epic poems, legends, myths, proverbs and narratives); c) the memories of the populations concerned; d) archaeological research and discoveries. Consensus on the recognition of sites is indispensable for the ultimate choice of sites.
- **Integration of the site/itinerary into a broader inventory** presenting a typology encompassing the full panorama of memorial sites linked to the geography and history of the territory concerned (architectural heritage, natural heritage and intangible heritage). This inventory must use the methodology and fact sheet established by the Slave Route Project. By analogy, and based on the work carried out within the framework of the World Heritage Convention (1972), the concept of routes or itineraries:
  - is based on the dynamics of movement and the idea of exchange, with **continuity** in space and time;
  - refers to a **whole**, where the route has a worth over and above the sum of the elements making it up and through which it gains its cultural significance;
  - highlights exchange and dialogue between countries or between regions;
  - is multi-dimensional, with different aspects developing and adding to its prime purpose.
- **The significance and impact of the site.** The site must make a significant contribution to raising awareness of the importance of the events of the slave trade and slavery associated with it, and reflects a particular aspect of that history. Through its historical value and its renown as a place of memory, the site must contribute to memory and history work on this subject.

- **Preservation and promotion of the site**. A preservation strategy must be in place ensuring maintenance and restoration of the site in order to conserve the qualities and features that determined its selection. Actions must also be taken to promote the site and educate the public on the subject of the tragedy of slavery and the resulting heritage.
- Sites and itineraries of memory granted the Slave Route Site label must keep the UNESCO Slave Route Project informed of their development and report on their promotional activities and initiatives.

The **Resource Book** for managers of sites and itineraries of memory provides technical guidance for applicants. The steering committee may also be consulted during the preparation of applications, particularly with regard to methodological points. In this respect, a sample inventory form may be provided to applicants on request; applicants may freely draw inspiration from it, making any necessary changes.

For information purposes, here is a sample identification plaque for a **Site of memory associated with the UNESCO Slave Route Project.**

The Slave Route: Resistance, Liberty, Heritage
History and Heritage Site of memory
associated with the UNESCO Slave Route Project

Launched in 1994, the international and inter-regional project 'The Slave Route: Resistance, Liberty, Heritage' addresses the history of the slave trade and slavery through the prism of intercultural dialogue, a culture of peace and reconciliation. It thereby endeavours to improve the understanding and transmission of this human tragedy by making better known its deep-seated causes, its consequences for societies today and the cultural interactions born of this history. The project is structured around five key fields of activity: scientific research, the development of educational materials, the preservation of written archives and oral traditions, the promotion of living cultures and contributions by the African diaspora and, lastly, the preservation of sites of memory.

The promotion of memorial itineraries connected with the slave trade and slavery plays a decisive role not only in educating the general public, and young people in particular, but also in national reconciliation and social cohesion processes in societies with legacies from the tragedy.

It is in this perspective that 'The Slave Route: Resistance, Liberty, Heritage' project has created a UNESCO Slave Route Site label to encourage the establishment of itineraries of memory that can tell this story and ensure that the intangible cultural heritage connected with it receives due attention at the national, regional and international levels.

This site fulfils the quality criteria set by the UNESCO Slave Route Project in conjunction with the International Network of Managers of Sites and Itineraries of memory

Chronology of prohibitions of the slave trade and abolitions of slavery

1777	Vermont incorporates the abolition of slavery into its constitution
1778	In the United States, the first laws granting freedom to slaves who agree to enlist in the army
1780	Pennsylvania passes a law to abolish slavery over time
1783	Abolition of slavery in Massachusetts
1784	The states of Rhode Island and Connecticut abolish slavery
1791	23 August, slave uprising in the north of the French colony of Saint-Domingue
1793	Abolition of slavery in Saint-Domingue
1794	French National Convention decree abolishing slavery
1801	Publication by Toussaint Louverture of the first constitution of Saint-Domingue confirming the abolition of slavery
	Toussaint Louverture occupies the eastern Spanish part of the island (Santo Domingo) where he proclaims the abolition of slavery
1802	Re-establishment of slavery in the French colonies
1803	The slave trade is banned by Denmark
1804	Haiti declares its independence
1807	The United Kingdom's ban on slave trading comes into effect
1808	The United States bans the slave trade
1814	The Netherlands bans the slave trade
1815	The European powers meeting at the Congress of Vienna pledge to outlaw the slave trade
1816	Simón Bolívar's decrees abolishing slavery
1821	President Boyer of Haiti refuses to hand over African captives set free in Port-au-Prince to the Spanish authorities in Cuba
1822	Abolition of slavery in Santo Domingo by Haitian President Boyer
	Liberia founded by the American Colonization Society
1823	Abolition of slavery in Chile
	The Society for the Abolition of Slavery is founded in London
1824	Abolition of slavery in Costa Rica, Honduras, Panama, El Salvador and Guatemala
1826	Abolition of slavery in Bolivia
1829	Abolition of slavery in Mexico
1831	French law prohibiting the slave trade
1833-1838	Abolition of slavery in the British colonies of the West Indies, British Guyana and Mauritius
	Abolition of slavery in Canada
1838	Abolition of slavery in the territories controlled by the British in India
	Abolition of slavery in Nicaragua
1842	Abolition of slavery in Uruguay

1844	Abolition of slavery in the Dominican Republic
1846	Abolition of slavery in Tunisia
1847	Abolition of slavery in the Swedish colony of Saint-Barthélemy
	Independence of Liberia
1848	Decree abolishing slavery in the French colonies
	Abolition of slavery in the colonies of the Danish Virgin Islands (Saint Thomas, Saint Jean, Saint Croix)
1851	Abolition of slavery in Colombia
1853	Abolition of slavery in Argentina
1854	Abolition of slavery in Venezuela
1855	Abolition of slavery in Peru
1863	Abolition of slavery in the Caribbean colonies of the Netherlands, in Suriname and in the islands of Southeast Asia
1863-1865	Abolition of slavery in the United States
1866	Spanish decree prohibiting the slave trade
1868-1878	The Ten Years' War in Cuba, during which freedom is promised to slaves who are willing to enlist in the army
1869	Abolition of slavery in the Portuguese colonies
1870	The Moret Law is passed to abolish slavery in the Spanish colonies
1873	Abolition of slavery in Puerto Rico
1876	Abolition of slavery in Turkey
1880-1886	Gradual abolition of slavery in Cuba
1888	Abolition of slavery in Brazil
1896	Abolition of slavery in Madagascar
1900	The delegates to the Pan-African Conference meeting in London send a petition to Queen Victoria denouncing 'the labour system applied to African natives in Rhodesia, the indenture system, a legalized form of slavery and compulsory labour'
1909	The British and Foreign Anti-Slavery Society founded in 1839 becomes Anti-Slavery International
1923	Abolition of slavery in Ethiopia and Afghanistan
1924	Abolition of slavery in Iraq
1926	The League of Nations adopts the Convention on Slavery
1930	The International Labour Office adopts the Convention concerning forced labour
1948	The Universal Declaration of Human Rights is adopted by the United Nations
1949	Adoption by the United Nations of the Convention for the Suppression of the Traffic in Persons and of the Exploitation of the Prostitution of Others (2 December)
1956	Adoption by the United Nations of the Supplementary Convention on the Abolition of Slavery, the Slave Trade and Institutions and Practices similar to Slavery

1957	The International Labour Organization adopts the Convention concerning the Abolition of Forced Labour
1963	Abolition of slavery in Saudi Arabia
1974	Creation by the United Nations (Commission on Human Rights) of the Working Group on Contemporary Forms of Slavery
1981	Abolition of slavery in Mauritania
1989	The United Nations adopts the Convention on the Rights of the Child
1992	Abolition of slavery in Pakistan
1994	Launch of UNESCO's 'Slave Route' Project
2000	The Charter of Fundamental Rights of the European Union prohibits slavery, forced labour and traffic in human beings
2001	Acknowledgement of slavery and the slave trade as 'crimes against humanity' by the United Nations World Conference against Racism, Racial Discrimination, Xenophobia and Related Intolerance (Durban, South Africa)
	A French law is passed recognizing the transatlantic slave trade and slavery as a crime against humanity
2002	Implementation of International Labour Organization Convention No. 182 'eliminating the worst forms of child labour'
2004	Declared by the United Nations the International Year for the Commemoration of the Struggle against Slavery and its Abolition to mark the bicentenary of Haiti
2007	A new decision to abolish slavery in Mauritania
2010	Senegal adopts a law declaring the slave trade and slavery to be crimes against humanity
2015	Mauritania adopts a law declaring slavery a crime against humanity

Dates to remember[1]

- January 1: Haiti — Independence Day (1804)[2]
- January 11: United States — National Human Trafficking Awareness Day (2007)
- January 23: Tunisia — Abolition of slavery (1846)
- January 3rd Monday: United States — Martin Luther King Jr. Day (1983)
- January: United States — National Slavery and Human Trafficking Prevention Month (2016)

- February 1: Mauritius — Abolition of slavery (1835)
- February 1: United States — National Freedom Day (signing of the Thirteenth Amendment to the Constitution of the United States, 1865)
- February : United States — Black History Month (Black History Week: 1926 ; Black History Month: 1976)
- February: Canada — Black History Month (Toronto, 1979)

- March 21: International Day for the Elimination of Racial Discrimination (United Nations, 1966)
- March 21: South Africa — Human Rights Day (1960)
- March 21: Panama — Abolition of slavery (1851)
- March 22: Puerto Rico — Emancipation Day, Abolition of slavery (1873)
- March 25: International Day of Remembrance of the Victims of Slavery and the Transatlantic Slave Trade (United Nations, 2007)

- April 16: United States—Emancipation Day (2002), Abolition of slavery in the District of Columbia (1862)
- April 17: Costa Rica—Abolition of slavery (1824)
- April 23: Honduras, El Salvador, and Guatemala—Abolition of slavery (1824)
- April 27: Senegal and Mayotte—Abolition of slavery (1848)
- April 28: Barbados—National Heroes Day (1998)
- April 30: International Jazz Day (UNESCO, 2011)
- April: Honduras—African Heritage Month (2002)

- May 1: Argentina — Abolition of slavery (1853)
- May 8: Columbus, Mississippi — Emancipation Day, Abolition of slavery (1865)
- May 10: France — National Day of Remembrance of the Slave Trade, Slavery, and Their Abolition (2005)
- May 10: Venezuela — Afro-Venezuelan Day (2005)
- May 13: Brazil — Abolition of slavery (1888)
- May 20: Florida — Emancipation Day, Abolition of slavery (1865)

1 The year indicated in parentheses is that of the proclamation or of the decision to commemorate the event.

2 The abolition of slavery was proclaimed in August and September 1793.

- May 21: World Day for Cultural Diversity for Dialogue and Development (UNESCO, 2001)
- May 21: Colombia — Abolition of slavery (1851) and Afro-Colombian Day (2001)
- May 22: Martinique — Abolition of slavery (1848)
- May 23: France — National Remembering Day for the Victims of Colonial Slavery (2017)
- May 25: African Liberation Day (Organization of African Unity, 1963)
- May 27: Guadeloupe — Abolition of slavery (1848)
- May 27: Saint Martin (French) — Abolition of slavery (1848)
- May 30: Panama — National Black Ethnicity Day (2000)
- May: Colombia — African Heritage and Slave Route Month (2011)

- June 4: Peru — Afro-Peruvian Culture Day (2006)
- June 10: French Guiana — Abolition of slavery (1848)
- June 19: Texas and the southern United States — Emancipation Day, Abolition of slavery (1865)

- July 1: Suriname, Curaçao, Aruba, Bonaire, Saba, Sint Eustatius, Saint Martin (Dutch), and the Netherlands — Emancipation Day, Abolition of slavery (1863)
- July 3: Saint Thomas, Saint John, and Saint Croix — Abolition of slavery (1848)
- July 18: Ecuador — Abolition of slavery (1851)
- July 18: Nelson Mandela International Day (UNESCO, 2009)
- July 24: Chile — Abolition of slavery (1823)
- July 25: International Afro–Latin American and Afro-Caribbean Women's Day (Santo Domingo, 1992)

- August 1: Saint Lucia — Emancipation Day, Abolition of slavery (1838)
- August 1: San Andrés, Isla de Providencia, and Santa Catalina — Emancipation Day, Abolition of slavery (1851)
- August 1: Canada — Emancipation Day, Abolition of slavery (1834)
- August 1: Guyana — Emancipation Day, Abolition of slavery (1838)
- August 1: Turks and Caicos Islands — Emancipation Day, Abolition of slavery (1838)
- August 1: Jamaica — Emancipation Day, Abolition of slavery (1838)
- August 1: Saint Vincent and the Grenadines — Emancipation Day, Abolition of slavery (1838)
- August 3: Trinidad and Tobago — Emancipation Day, Abolition of slavery (1838)
- August 4: Barbados — Emancipation Day, Abolition of slavery (1838)
- August 8: Paducah and McCracken County, Kentucky — Emancipation Day, Abolition of slavery (1865)
- August 1st Monday: Dominica and Grenada — Emancipation Day, Abolition of slavery (1838)
- August 1st Monday: Bahamas — Emancipation Day/Carnival, Abolition of slavery (1838)
- August 1st Monday: Anguilla — Emancipation Day, Abolition of slavery (1838)
- August 1st Monday: Antigua and Barbuda — Ema[illegible]on Day/Carnival, Abolition of slavery (1834)

- August 1st Monday & Tuesday: Saint Kitts–Nevis — Emancipation Day, Abolition of slavery (1838) and "Culturama" on Nevis (1974)
- August 1st Monday, Tuesday & Wednesday: British Virgin Islands (Tortola, Virgin Gorda, Anegada, Jost Van Dyke) Emancipation Day, Abolition of slavery (1838)
- Thursday before the first Monday in August: Bermuda — Emancipation Day, Abolition of slavery (1838)
- August 2nd Tuesday: Bahamas — Fox Hill Day, Abolition of slavery (1834)
- August 17: Curaçao: Commemoration of the 1795 slave revolt
- August 23: International Day for the Remembrance of the Slave Trade and Its Abolition (1998)
- August 27: Nicaragua — Freedom Day, Crab Festival (Corn Island) (1841)
- August 31: Costa Rica — Day of the Blacks and of Afro–Costa Rican Culture (1980)

- September 15: Mexico — Abolition of slavery (1829)
- September 23: Bolivia — National Day for Afro-Bolivian People and Culture (2011)

- October 1st Sunday : Ecuador — National Day for Afro-Ecuadoran People (1997)
- October 2: Paraguay — Abolition of slavery (1869)
- October 9: Saint-Barthélemy — Abolition of slavery (1847)
- October 10: Cuba — Black Day (1868)
- October 12: Argentina — Day of Respect for Cultural Diversity (2010)
- October 12: Costa Rica — Cultures Day (1994)
- October 12: Dominican Republic — Dominican Race and Identity Day
- October 19: Mexico — Black Afro-Mexican People of Oaxaca Day (2013)
- October 3rd Monday: Jamaica — National Heroes Day (1965)
- October 26: Bolivia — Abolition of slavery (1826) — United Kingdom — Black History Month November

- November 8: Argentina — National Afro-Argentinian and African Culture Day (2013)
- November 12: Nicaragua — Abolition of slavery (1838)
- November 19: Belize — Garifuna Settlement Day (1977)
- November 20: Brazil — Black Awareness Day/National Day for Black Consciousness (2003)

- December 2: International Day for the Abolition of Slavery (United Nations, 1949)
- December 3: Uruguay — National Day for Candombe, Afro-Uruguayan Culture, and Racial Equality (2006)
- December 5: Peru — Abolition of slavery (1855)
- December 6: Dominican Republic — Abolition of slavery (1844)
- December 10: Human Rights Day (United Nations, 1950)
- December 12: Uruguay — Abolition of slavery (1842)
- December 20: La Réunion — Abolition of slavery

International days related to the slave trade and slavery proclaimed by the United Nations

2 December International Day for the Abolition of Slavery

23 August International Day for the Remembrance of the Slave Trade and its Abolition

25 March International Day of Remembrance of Victims of Slavery and Transatlantic Slave Trade

International Decade for People of African Descent (2015-2024)

In 2001, the World Conference Against Racism held in Durban, South Africa, which had recognized the slave trade and slavery as 'crimes against humanity', adopted a Declaration and Programme of Action proposing concrete measures to combat racism, racial discrimination, xenophobia and related intolerance. Ten years later, in 2011, during the Durban III Conference a mid-term evaluation that was done previously (April 2009) revealed the need to revive this momentum and mobilize Member States to translate their commitment into concrete actions.

In an effort to revive the momentum generated by the Durban Conference, 2011 was proclaimed as International Year for People of African Descent. At the end of that International Year, it was recognized that despite the large number of actions undertaken by some Member States, international organizations and civil society, the extensive work needed to live up to expectations of significant progress in the rights of people of African descent could not be achieved in a single year. Therefore, the need for a Decade was recognized by the United Nations to give Member States enough time to meet their commitments.

In December 2014, the International Decade for People of African Descent (2015-2024) was proclaimed by the United Nations General Assembly through its resolution 68/237. Taking account of the burden of history, its consequences and present-day realities, the Decade is centred on the themes of 'Recognition, Justice and Development'.

The proclamation of this Decade was the result of a lengthy debate between Member States from all regions regarding its utility, relevance, goals and themes. Member States from Latin America, the Caribbean and Africa have endeavoured for this Decade to be proclaimed with a practical activities programme.

The Decade aims to set up a framework and an operational platform that encourage Member States to put policies into place that reduce the social injustice handed down through history from which people of African descent still suffer; to combat racism, racial prejudice and racial discrimination through education; and to promote their contributions to the progress of humanity and to the development of modern societies.

The main objectives of the International Decade are:

- To strengthen national, regional and international action and cooperation in relation to the full enjoyment of economic, social, cultural, civil and political rights by people of African descent and their full and equal participation in all aspects of society;

- To promote a greater knowledge of and respect for the diverse heritage, culture and contribution of people of African descent to the development of societies;
- To adopt and strengthen national, regional and international legal frameworks in accordance with the Durban Declaration and Programme of Action and the International Convention on the Elimination of All Forms of Racial Discrimination, and to ensure their full and effective implementation.

Since this Decade follows on from the World Conference in Durban, the Office of the United Nations High Commissioner for Human Rights (OHCHR) was designated as lead agency. With the support of the UN Working Group of Experts on People of African Descent, a wide-scale consultation of the key stakeholders (governments, civil society, professional organizations, international and regional organizations, and experts, among others) was held to prepare a draft programme of activities for the Decade, which was submitted to the General Assembly of the United Nations for adoption (A/RES/69/16).

UNESCO, whose efforts to combat prejudice and discrimination are at the heart of its mandate, was involved in the consultation through its Slave Route Project and General History of Africa, among other projects. It is explicitly involved in contributing to certain recommendations of the action programme, aiming to:

- promote a greater knowledge of and respect for people of African descent and their culture, history and heritage through research, education and inclusion in curricula;
- ensure that textbooks and other teaching materials adequately reflect the history of tragedies suffered by these people, including the slave trade, slavery and colonialism, to prevent falsifications and stereotyping of this history;
- preserve the memory of the victims of these tragedies and their descendants through the establishment of memory sites testifying to this past and encourage the international community to honour this memory, in various ways;
- combat discrimination against people of African descent in their access to education, particularly quality education, a tool to counteract prejudice, stereotypes, stigmatization and racial profiling.

Cultural assets bearing direct or indirect traces of the slave trade, inscribed on the World Heritage List[3]

Antigua and Barbuda

- Antigua Naval Dockyard and Related Archaeological Sites (2016)

Barbados

- Historic Bridgetown and its Garrison (2011)

Benin

- Royal Palaces of Abomey (1985)

3 All the sites related to the slave trade and slavery have an outsta[452]versal value that recognizes this history. However, they can be inscribed on the World Heritage List according to different criteria.

Brazil

- Historic Town of Ouro Preto (1980)
- Historic Centre of the town of Olinda (1982)
- Historic Centre of Salvador de Bahia (1985)
- Valongo Wharf Archaeological Site (2017)

Cape Verde

- Cidade Velha, Historic Centre of Ribeira Grande (2009)

Chile

- Rapa Nui National Park (1995)
- Historic Quarter of the Seaport City of Valparaiso (2003)

Colombia

- Port, Fortresses and Group of Monuments, Cartagena (1984)

Cuba

- Old Havana and its Fortifications (1982)
- Trinidad and the Valley of Los Ingenios (1988)
- San Pedro de la Roca Castle, Santiago de Cuba (1997)
- Archaeological Landscape of the First Coffee Plantations in the South-East of Cuba (2000)

Dominican Republic

- Colonial City of Santo Domingo (1990)

France

- Bordeaux, Port of the Moon (2007)

Gambia

- Kunta Kinteh Island and related sites (2003)

Ghana

- Forts and Castles, Volta, Greater Accra, Central and Western Regions (1979)

Haiti

- National History Park - Citadel, Sans Souci, Ramiers (1982)

Kenya

- Lamu Old Town (2001)

Mauritania

- Ancient Ksour of Ouadane, Chinguetti, Tichitt and Oualata (1996)

Mauritius

- Aapravasi Ghat (2006)
- Le Morne Cultural Landscape (2008)

Mozambique

- Island of Mozambique (1991)

Netherlands

- Historic Area of Willemstad, Inner City and Harbour, Curaçao (1997)

Panama

- Fortifications on the Caribbean Side of Panama: Portobelo, San Lorenzo (1980)

Paraguay

- Jesuit Missions of la Santísima Trinidad de Paraná and Jesús de Tavarangue (1993)

Peru

- Historic Centre of Lima (1988)

Portugal

- Central Zone of the Town of Angra do Heroismo in the Azores (1983)
- Historic Centre of Oporto (1996)

Saint Kitts and Nevis

- Brimstone Hill Fortress National Park (1999)

Senegal

- Island of Gorée (1978)
- Island of Saint-Louis (2007)

Suriname

- Historic Inner City of Paramaribo (2002)

United Kingdom of Great Britain and Northern Ireland

- Maritime Greenwich (1997)
- Historic Town of St George and Related Fortifications, Bermuda (2000)
- Liverpool – Maritime Mercantile City (2004)

United Republic of Tanzania

- Ruins of Kilwa Kisiwani and Ruins of Songo Mnara (1981)
- Stone Town of Zanzibar (2000)

United States

- Independence Hall (1979)
- Statue of Liberty (1984)
- Monticello and the University of Virginia in Charlottesville (1987)

Yemen

- Historic Town of Zabid (1993)

For more information:

UNESCO World Heritage website: http://whc.unesco.org/

Elements directly or indirectly related to the slave trade and slavery included in the Representative List of the UNESCO Intangible Cultural Heritage

Argentina and Uruguay

- Tango (2009)

Belize, Guatemala, Honduras and Nicaragua

- Language, dance and music Garifuna (2008)

Brazil

- Samba de Roda of the Recôncavo of Bahia (2008)
- Frevo, performing arts of the Carnival of Recife (2012)
- The Candle of Our Lady of Nazareth at Belem, in the State of Para (2013)
- Capoeira circle (2014)

Colombia

- Carnival of Barranquilla (2008)
- Cultural space of Palenque de San Basilio (2008)
- Marimba music and traditional chants from Colombia's South Pacific region (2010)
- Festival of St Francis of Assisi, Quibdó (2012)
- Traditional Vallenato music of the Greater Magdalena region (2015)

Colombia, Ecuador

- Marimba music, traditional chants and dances from the Colombia South Pacific region and Esmeraldas Province of Ecuador (2015)

Cuba

- La Tumba Francesa (2008)
- Rumba in Cuba, a festive combination of music and dances and all the associated practices (2016)

Dominican Republic

- Cocolo dance drama tradition (2008)
- Cultural space of the Brotherhood of the Holy Spirit of the Congos de Villa Mella (2008)
- Music and dance of the merengue in the Dominican Republic (2016)

France (Guadeloupe)

- Gwoka: music, song, dance and cultural practice representative of Guadeloupean identity (2014)

France (Réunion)

- Maloya (2009)

Jamaica

- Maroon heritage of Moore Town (2008)

Maurice

- Traditional Mauritian Sega (2014)

Uruguay

- Candombe and its socio-cultural space: a community practice (2009)

Venezuela (Bolivarian Republic of)

- The Parranda of San Pedro de Guarenas and Guatire (2013)
- Carnival of El Callao, a festive representation of a memory and cultural identity (2016)

For more information:

UNESCO Intangible Cultural Heritage website: https://ich.unesco.org/

List of documentary heritage inscribed on the 'Memory of the World : Documentary Heritage' and directly or indirectly related to the history of slavery

1. Documentary heritage related to the history of slavery

- **Archive Middelburgsche Commercie Compagnie (MCC)**

  Documentary heritage submitted by Curacao the Netherlands and Suriname and recommended for inclusion in the memory of the World Register in 2011.

  The archives of the Middelburgsche Commercie Compagnie (MCC, Trade Company of Middelburg), constitute both a unique and, from a global perspective, crucial collection of documentary heritage that allows a greater understanding of the slave trade in the so-called triangle trade from Middelburg, the capital of the province of Zeeland in the Netherlands, across the Atlantic in the 18th century (1730-1800).

  Year of submission: 2010

  Year of inscription: 2011

  Country: Curacao, the Netherlands, Suriname

- **Book for the Baptism of Slaves (1636-1670)**

  Documentary heritage submitted by the Dominican Republic and recommended for inclusion in the memory of the World Register in 2009.

  The book is a source of precious information on the form, character and other details of slavery in the Americas, particularly in the Dominican Republic. It sheds light on a lesser-known aspect of the colonial slave system and provides insight into the country's transition from a slave society to a society with slaves, or rather from a slave plantation society to patriarchal slavery. This later concept was accepted simply because it was not dependent on the world market system, but rather served to consolidate or secure the social levels in a native society or the Creole society.

  Year of submission: 2008

  Year of inscription: 2009

  Country: Dominican Republic

■ **Dutch West India Company (Westindische Compagnie) archives**

Documentary heritage submitted by Brazil, Ghana, Guyana, the Netherlands, the Netherlands Antilles, Suriname, the United Kingdom and the United States and recommended for inclusion in the memory of the World Register in 2011.

The DWIC archives are primary resources for researching the history of the European expansion into West Africa and the Americas. The records concern various themes such as commerce and slave trade, warfare, early modern diplomacy, plantation cultures and daily life issues. Moreover, the DWIC archives contain information on the history of the regions where the DWIC founded colonies and trading posts. In many instances there is no other written information available for that period. The DWIC archives provide unique information that is important for the history of Brazil, Ghana, Guyana, the Netherlands, the Netherlands Antilles, Suriname and the United States and therefore have great international value.

Year of submission: 2010

Year of inscription: 2011

Country: Brazil, Ghana, Guyana, the Netherlands, the Netherlands Antilles, Suriname, the United Kingdom and the United States

■ ***Negros y Esclavos* archives**

Documentary heritage submitted by Colombia and recommended for inclusion in the memory of the World Register in 2005.

The archive collection entitled 'Negros y Esclavos' that forms part of the documentary assets of the 'Archivo General de la Nación' contains extensive and very important testimonial information about the development of the African slave trade in the 'Neogranadino' territory. The collection is composed of 55 files, equivalent to approximately 55,000 pages, that refer not only to the history of Colombia, but also to the history of Ecuador, Panama and Venezuela.

New slaves were sent to the different Spanish colonies in South America from the port of Cartagena, which documented information about slaves and their treatment. Regrettably, most documents produced in Cartagena during that period, 16th to 18th centuries, have disappeared. The 'Archivo General de la Nación' together with the archives of the 'General de Indias de Sevilla', preserve the remaining documents on this topic.

Year of submission: 2005

Year of inscription: 2005

Country: Colombia

- **Records of the French occupation of Mauritius**

  Documentary heritage submitted by Mauritius and recommended for inclusion in the memory of the World Register in 1997.

  Series of records of the French occupation of Mauritius, then known as Isle de France, and the early English period - 17th and 18th centuries. These series include records of the early French settlements in Isle de France and Isle Bourbon, other islands of the Indian Ocean, Africa and Asia, as well as records of the East India Company, navigation, pirates and corsairs, naval troops and battles in the Indian Ocean and the first European settlers in this part of the world.

  Year of submission: 1997

  Year of inscription: 1997

  Country: Mauritius

- **Records of Indian indentured labourers**

  Documentary heritage submitted by Fiji, Guyana, Suriname, Trinidad and Tobago and recommended for inclusion in the memory of the World Register in 2011.

  The immigration of Indian indentured labourers was first accounted for in the 1830s. Over a period of roughly 100 years, 1,194,957 Indians were relocated to 19 colonies. These records are the only documents available for ancestral and lineage research for the numerous descendants of those Indian labourers. The arrival of large groups of Indian labourers in the receiving colonies had immense repercussions, many of which are still being felt today. The Indian diaspora had an enormous impact on the local economy, the politics and the socio-cultural make-up of the colonies.

  Year of submission: 2010

  Year of inscription: 2011

  Countries: Fiji, Guyana, Suriname, Trinidad and Tobago

- **Registry of Slaves of the British Caribbean 1817-1834**

  Documentary heritage submitted by the Bahamas, Belize, Bermuda, Dominica, Jamaica, St Kitts, Trinidad and Tobago and the United Kingdom and recommended for inclusion in the memory of the World Register in 2009, with an addendum in 2011.

  Enslaved Africans made up the great majority of transatlantic migrants who were forcibly removed to the Americas from Columbus' first voyages in the 15th century until the 19th century. The transatlantic slave trade, originating in Africa and ending in the Caribbean and the Americas, remains a sensitive subject for several reasons, including issues of race, morality, ethics, identity, underdevelopment and reparations.

  Year of submission: 2008

  Year of inscription: 2009

  Country: the Bahamas, Belize, Dominica, Jamaica, St Kitts, Trinidad and Tobago, the United Kingdom

- **West India Committee collection**

  Documentary heritage submitted by Anguilla, Antigua and Barbuda, Jamaica, Montserrat and the United Kingdom, and recommended for inclusion in the memory of the World Register in 2016.

  The West India Committee (WIC) collection is a unique documentary heritage crucial to the comprehension of the transatlantic slave trade, providing insight into many unacknowledged innovations, institutions and inventions derived directly from the trade. The WIC archival collection enhances the historiography and general understanding of the contribution made by West Indians to the development of the global economy, and civil society.

  Year of submission: 2014

  Year of inscription: 2016

  Country: Anguilla, Antigua and Barbuda, Jamaica, Montserrat, the United Kingdom

- **Records of indentured immigration**

  Documentary heritage submitted by Mauritius and recommended for inclusion in the memory of the World Register in 2015.

  Unique and comprehensive documentation depicting the success and extent of the 'Great Experiment' undertaken during the mid-19th century to assess the viability of a new system of labour following the abolition of slavery and the end of the apprenticeship system to which the liberated slaves were subjected. Indentured immigration led to the displacement of some 456,000 individuals originating from China, India, Madagascar, South-East Asia and areas of the African continent. Having proved successful, this new system was emulated by other British and European colonies and countries around the world.

  Year of submission: 2014

  Year of inscription: 2015

  Country: Mauritius

- **Eric Williams Collection**

  Documentary heritage submitted by Trinidad and Tobago and recommended for inclusion in the memory of the World Register in 1999.

  The Eric Williams Heritage is of worldwide significance since it documents the life and times of Dr Eric Williams, Prime Minister of Trinidad and Tobago, international statesman and esteemed scholar, during the period 1956-1981. The material depicts various aspects of Dr Williams' life and his contribution to Trinidad and Tobago, the Caribbean region and the world. His scholarship comprises a number of significant writings. His seminal work, Capitalism and Slavery, has made an indelible contribution to the historiography of slavery and has defined the study of Caribbean history.

  Year of submission: 1999

  Year of inscription: 1999

  Country: Trinidad and Tobago

- **West Indian Commission papers**

Documentary heritage submitted by Barbados and recommended for inclusion in the memory of the World Register in 2015.

The West Indian Commission papers represent the first in-depth enquiry commissioned by independent nations to examine the impact of a rapidly changing global environment on living conditions in small island developing states. Established in July 1989 as an independent body by the Caribbean Community (CARICOM), the Commission was mandated to undertake consultations with Caribbean people on issues pertaining to social, cultural and economic development. The collection contains transcripts of over 350 written submissions, several commissioned studies, special reports and publications.

Year of submission: 2014

Year of inscription: 2015

Country: Barbados

2. Documentary heritage not explicitly referring to the history of slavery

- **Archives of the Dutch East India Company**

Documentary heritage submitted by India, Indonesia, the Netherlands, South Africa Sri Lanka and recommended for inclusion in the memory of the World Register in 2003.

The Dutch East India Company (VOC, Vereenigde Oostindische Compagnie), founded in 1602 and liquidated in 1795, was the largest and most impressive of the early modern European trading companies operating in Asia. About 25 million pages of VOC records have survived in repositories in Jakarta, Colombo, Chennai, Cape Town, and The Hague. The VOC archives make up the most complete and extensive source on early modern world history anywhere with data relevant to the history of hundreds of Asia's and Africa's former local political and trade regions.

Additional information is available at the website www.tanap.net.

Year of submission: 2003

Year of inscription: 2003

Country: India, Indonesia, the Netherlands, South Africa Sri Lanka

■ **Archives of the Danish overseas trading companies**

Documentary heritage submitted by Denmark and recommended for inclusion in the memory of the World Register in 1997.

A number of archival collections held in the Danish National Archives reflect Denmark's relations with foreign countries such as other European states, Russia, Turkey, as well as countries in North Africa and in the Americas. The archival collection of the Danish overseas trading companies includes, in particular, the archives of the Danish East India Company, the Danish Asiatic Company, the Danish West India and Guinea Company and the Danish West India Trading Company. It consists of around 4,000 protocols and bundles of documents and includes royal charters, copybooks, letters, instructions, accounts, ship's logs, maps...

Year of submission: 1997

Year of inscription: 1997

Country: Denmark

■ **Colonial music in the Americas: a sample of its documentary richness**

Documentary heritage submitted by Bolivia, Colombia, Mexico and Peru and recommended for inclusion in the memory of the World Register in 2007.

The documentary collections of music from the 16th to the 18th century from different countries of the Americas are an essential part of the cultural history of the New World in all aspects: religious and lay, civil and political, cultural and popular, vocal and instrumental, mystic and dramatic, renaissance, baroque and classic. They constitute the testimony of different cultures (indigenous, African and European) which mixed and gave birth to a new culture, not completely western, nor Hispanic, nor purely American, for three centuries.

Year of submission: 2007

Year of inscription: 2007

Country: Bolivia, Colombia, Mexico, Peru

- **Corpo Cronológico (collection of manuscripts on the Portuguese discoveries)**

  Documentary heritage submitted by Portugal and recommended for inclusion in the memory of the World Register in 2007.

  A truly unique and significant set of public manuscript documents that offer information about and throw light on European, and more particularly Portuguese, relations with the peoples of Africa, Asia and Latin America, for the most part during the 15th century and the first half of the 16th century.

  These documents represent a heritage of archives of considerable importance for acquiring knowledge of the political, diplomatic, military, economic and religious history of numerous countries at the time of the Portuguese discoveries.

  Year of submission: 2007

  Year of inscription: 2007

  Country: Portugal

- **Farquharson's Journal**

  Documentary heritage submitted by the Bahamas and recommended for inclusion in the memory of the World Register in 2009.

  A handwritten diary by Charles Farquharson, planter, and owner of the cotton growing Prospect Hill Plantation, located on the east side of Watlings Island (now known as San Salvador). It records the day-to-day happenings on the plantation from 1 January 1831 to 31 December 1832. As most plantation owners were absentee landlords, this journal from the lived experience of an owner provides unique insights into plantation life

  Year of submission: 2008

  Year of inscription: 2009

  Country: the Bahamas

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Legacies of Slavery: A Resource Book for Managers of Site[illegible]neraries of Memory.
The UNESCO Slave Route Project: Resistance, Liberty, Heritage

The Slave Route:

Resistance, Liberty, Heritage

http://www.unesco.org/new/en/social-and-human-sciences/themes/slave-route/

#slaveroute

UNESCO

History and Memory for Dialogue Section

Tel.: +33 (0) 1 45 68 16 98

E-mail : projetlaroutedelesclave@unesco.org

Legacies of Slavery

A Resource Book for Managers of Sites and Itineraries of Memory

This resource book is designed for managers of sites and itineraries of memory related to the slave trade and slavery. It provides a comparative analysis of experiences in the preservation and promotion of such sites across the world and proposes practical guidance for their management and development.

It is the first resource book on this specific issue to be published by a UN agency, and provides guidelines on how best to preserve, promote and manage sites of memory, taking into account the sensitivity of this painful memory.

Designed in two parts, the resource book contains conceptual and practical information for managers. It showcases concrete examples of sites and museums implementing particular strategies for the preservation, promotion and interpretation of heritage related to the slave trade and slavery. Moreover, it offers advice and recommendations for the development of memory tourism, responding to the growing demand from citizens to better know this history.

Its main purpose is to contribute to capacity-building for the benefit of site managers and memory itineraries, and to raise awareness on the ethical issues posed by these historical sites.

United Nations
Educational, Scientific and
Cultural Organization

Social and Human Sciences Sector

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Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Items for Discussion and Consideration

SUBJECT: COVID Numbers in Carteret County and Returning to In-Person Meetings Check-In

BRIEF SUMMARY:

During the June 28, 2021, BOC Work Session, the Board discussed returning to in-person meetings for all Town Boards beginning in August and directed staff to research hybrid meeting options and provide an update at the July Work Session.

With COVID and the new delta variant cases on the raise in Carteret County and across the State of North Carolina, the Board agreed to hold off on returning to in-person meetings. The Board directed staff to provide an update on current county and state COVID metrics at each Board of Commissioners meeting to assess when to return to in-person meetings safely.

REQUESTED ACTION:

The Town Clerk recommends the Board receive the current COVID-19 data and provide direction to staff.

EXPECTED LENGTH OF PRESENTATION:

10 minutes

SUBMITTED BY:

Allen Coleman,

Town Clerk and Assistant to the Town Manager

BUDGET AMENDMENT REQUIRED:

No

Town of Beaufort, NC

701 Front St. - P.O. Box 390 - Beaufort, N.C. 28516
252-728-2141 - 252-728-3982 fax - www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Public Hearing

SUBJECT: Request to Rezone 100 Fairview Drive and 1310 Live Oak Street from B-1 to TCA; Case No. 21-18

BRIEF SUMMARY:

The applicant wishes to rezone 1.589 acres from B-1 Commercial to TCA Townhomes, Condominiums and Apartments. At their June 21, 2021 meeting the Planning Board unanimously recommended approval of the rezoning and update to the existing CAMA Land Use Map.

REQUESTED ACTION:

The Planning and Inspections Director recommends the Board conduct a public hearing and consider voting to approve the rezoning request and authorize the Mayor and Town Clerk to execute the applicable ordinance amendment and resolution documents.

EXPECTED LENGTH OF PRESENTATION:

10 Minutes

SUBMITTED BY:

Kyle Garner, AICP

Planning & Inspections Director

BUDGET AMENDMENT REQUIRED:

N/A

Staff Report

To: Board of Commissioners **Date:** 6/28/2021
From: Kyle Garner **Meeting Date:** 8/9/2021

Case Number 21-18

Summary of Request: Request to Rezone 100 Fairview Drive and 1310 Live Oak Street from B-1 General Business to TCA Townhomes, Condominiums and Apartments

Background

Location(s) & PIN
1. 100 Fairview Drive (PIN 730615626574000)
2. 1310 Live Oak Street (PIN 730615625546000)

Owner Beaufort Properties – NM, LLC
Applicant Pamlico Limited Partnership

Current Zoning B-1 General Business

Lot(s) Size & Conformity Status
1. 0.936 acres or 40,772.16 ft^2
   Conforming Lot of Record
   Road Frontage – Fairview Drive 149.99'
2. 0.653 acres or 28,444.68 ft^2
   Conforming Lot of Record
   Road Frontage – Live Oak Street 95.83'
   Road Frontage – Fairview Drive 309.01'

Existing Land Use Vacant

CAMA Future Land Use Map Medium Density Residential
Amendment Required ☒ Yes ☐ No High Density Residential

Adjoining Land Use & Zoning
North B-1; Commercial
South R-8; Residential
East R-8; Residential
West R-8; Residential

Special Flood Hazard Area ☐ Yes ☒ No Shaded X

Public Utilities
Water ☒ Available ☐ Not Available
Sewer ☒ Available ☐ Not Available

Additional Information See Staff Comments

Requested Action
1. Conduct public hearing
2. Approve the request, deny the request, or approve a more restrictive zoning district

Staff Comments

The total area of the two lots combined is 1.589 acres (+/-). Based on the maximum density of 12 units per acre, the maximum number of units possible, if approved, is 19.

*The **Planning Board** reviewed the request at its **June 21, 2021** Regular Meeting. Vice Chair Merrill made a motion to recommend approval of the requested rezoning, noting that though inconsistent with the CAMA Future Land Use Map, the request is a downzoning from the current zoning district and closer to compliance with the Future Land Use Map and consistent with development in the area. Member LoPiccolo seconded the motion which passed with 5/5 members present in favor.*

The current **B-1 General Business District Standards**

Minimum Lot Size	5,000 Square Feet	Setbacks	
Minimum Lot Width	60 Feet	Front	30 Feet
Maximum Building Height	40 Feet	Rear	15 Feet
Maximum Impervious	N/A	Side	15 Feet

The requested **TCA Townhomes, Condominiums and Apartments District Standards**

Minimum Lot Size	2,750 Square Feet	Setbacks	
Minimum Lot Width	80 Feet	Front	25 Feet
Maximum Building Height	35 Feet	Rear	30 Feet
Maximum Impervious	N/A	Side	8 Feet
		ROW Side	15 Feet

Consistency Statement & CAMA Core Land Use Plan Amendment

In accordance with **NCGS § 160A-383**, the consistency statement must include one of the following:

- A statement recommending approval of the zoning amendment and describing its consistency with the CAMA Core Land Use Plan
- A statement recommending denial of the zoning amendment and describing its inconsistency with the CAMA Core Land Use Plan
- A statement recommending approval of the zoning amendment containing the following:
    - Declaration that the approval is also deemed an amendment to the CAMA Core Land Use Plan
    - An explanation of the change in conditions the board took into consideration when recommending approval

CAMA Core Land Use Plan – Future Land Use Classifications

Current: Medium Density Residential

The Medium Density Residential classification is intended to delineate lands where the predominant land use is higher density single-family residential developments and/or two-family developments. The residential density within this classification is generally 3 to 5 dwelling units per acre. Minimum

lot sizes vary from 8,000 to 10,000 square feet unless a larger minimum lot area is required by the health department for land uses utilizing septic systems. Land uses within Medium Density Residential-designated areas are generally compatible with the R-8, Medium Density Residential, R-8A Single-family Medium Density Residential Waterfront; R8-MH Residential Manufactured Home Park/Recreational Vehicle Park; and H-BD, Historic Business Zoning Districts. Public water is widely available and sewer service is required to support the higher residential densities in this classification. Streets with the capacity to accommodate higher traffic volumes are also necessary to support Medium Density Residential development.

Requested: High Density Residential

The High Density Residential classification is intended to delineate lands where the predominant land use is higher density single-family residential developments and/or multifamily developments. The residential density within this classification is generally 6 to 16 dwelling units per acre. The minimum lot size is 2,750 square feet per unit unless a larger minimum lot area is required by the health department for land uses utilizing septic systems. Land uses within High Density Residential-designated areas are generally compatible with the RC-5, Residential Cluster Development and the RS-5, Residential Single-Family 5 Development Zoning Districts. Public water and sewer service is required to support the residential densities in this classification. Streets with the capacity to accommodate higher traffic volumes are also necessary to support High Density Residential development.

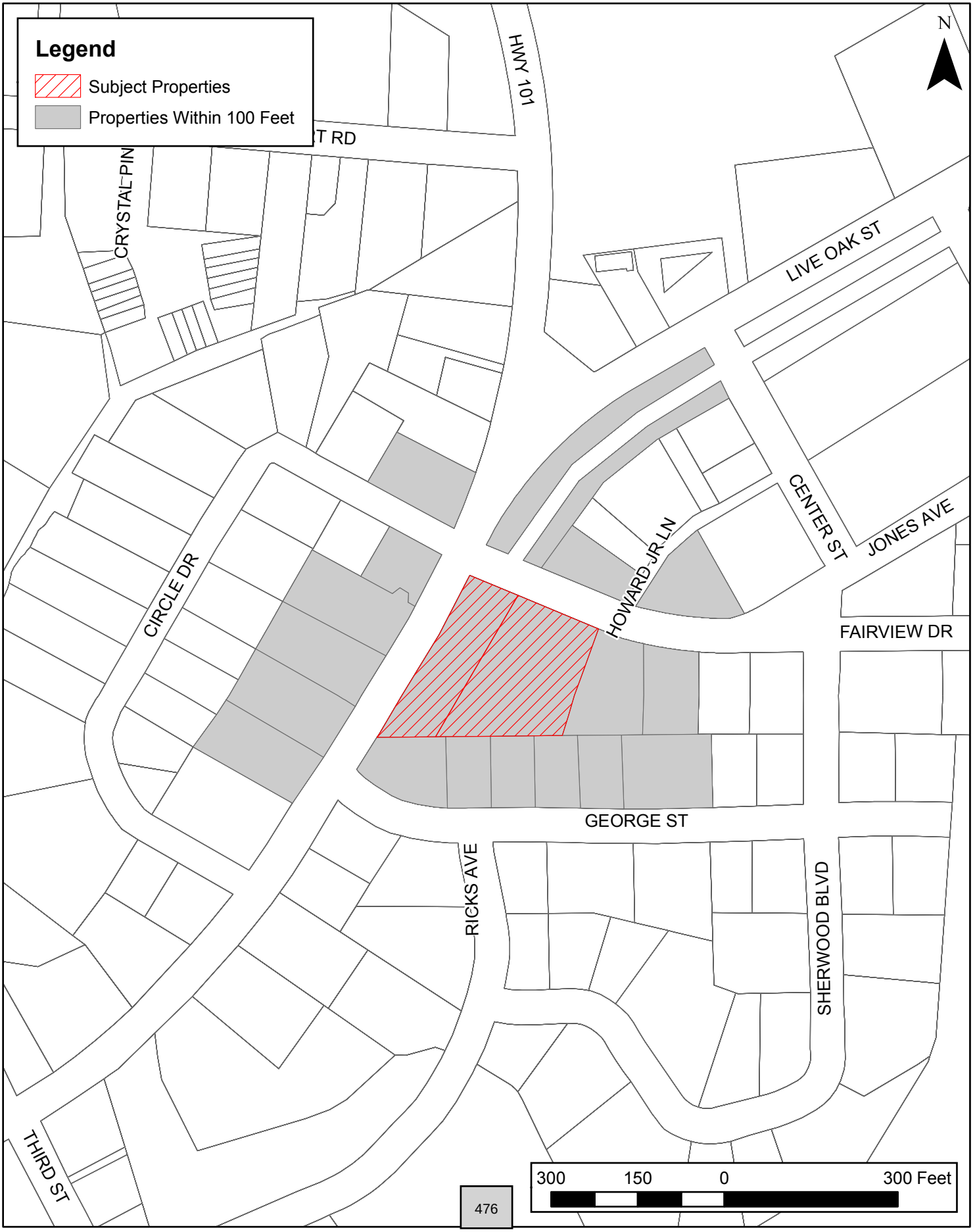
Attachments:

1. Property Owners Within 100 Feet
2. Vicinity Map
3. Aerial Map
4. Current Zoning Map
5. Future Land Use Map
6. Flood Hazard Areas Map
7. LDO Excerpts – B-1 General Business District
8. LDO Excerpts – TCA Townhomes, Condominiums and Apartments District
9. Application as Submitted
10. Consistency Statement & Ordinance Amending Zoning Map
11. Resolution Amending FLU Map

OWNER	MAILING ADDRESS	CITY STATE ZIP
ANNIE L JONES COMPANY INC	120 JERICHO DRIVE	BEAUFORT NC 28516
O'BERRY, WALTER S IV ETUX M.	127 CIRCLE DRIVE	BEAUFORT NC 28516
MORRIS FAMILY VENTURES LLC	PO BOX 12587	NEW BERN NC 28561
CROBAR, SANDRA K	128 CIRCLE DRIVE	BEAUFORT NC 28516
WPJS PROPERTIES LLC	PO BOX 88	WINTERVILLE NC 28590
RECKER, BRIAN E ETUX EMILY W	1311 LIVE OAK STREET	BEAUFORT NC 28516
BEAUFORT PROPERTIES-NM LLC	PO BOX 10189	WILMINGTON NC 28404
BEAUFORT PROPER HOLDINGS LLC	2441 HWY 70 E	BEAUFORT NC 28516
BICKLEY, JENNIFER LYNN	102 FAIRVIEW DRIVE	BEAUFORT NC 28516
BOYETTE, TRENT CHRISTIAN ETAL	104 FAIRVIEW ROAD	BEAUFORT NC 28516
DARRESS, ROBERT L ETUX MARIA L	1307 LIVE OAK STREET	BEAUFORT NC 28516
SCHMIDT, ALVA R ETUX DIANE	1305 LIVE OAK ST	BEAUFORT NC 28516
BULLOCK, THOMAS M ETUX JANE	209 GEORGE ST	BEAUFORT NC 28516
GARRIS, ROBERT J SR ETUX KAREN	108 POPLAR RIDGE ROAD	GOLDSBORO NC 27534
GARNER, EUGENE M JR ETUX DIANNE	173 JACKSON DRIVE	BEAUFORT NC 28516
DIXON, JOSEPH CARL	201 GEORGE STREET	BEAUFORT NC 28516
HILL, GEORGE STEPHEN	1904 SNOWY EGRET DRIVE	MOREHEAD CITY NC 28557
TARR, CYNTHIA RAE	1322 HWY 101	BEAUFORT NC 28516

Vicinity Map

Case No. 21-18



06042021

Aerial Map

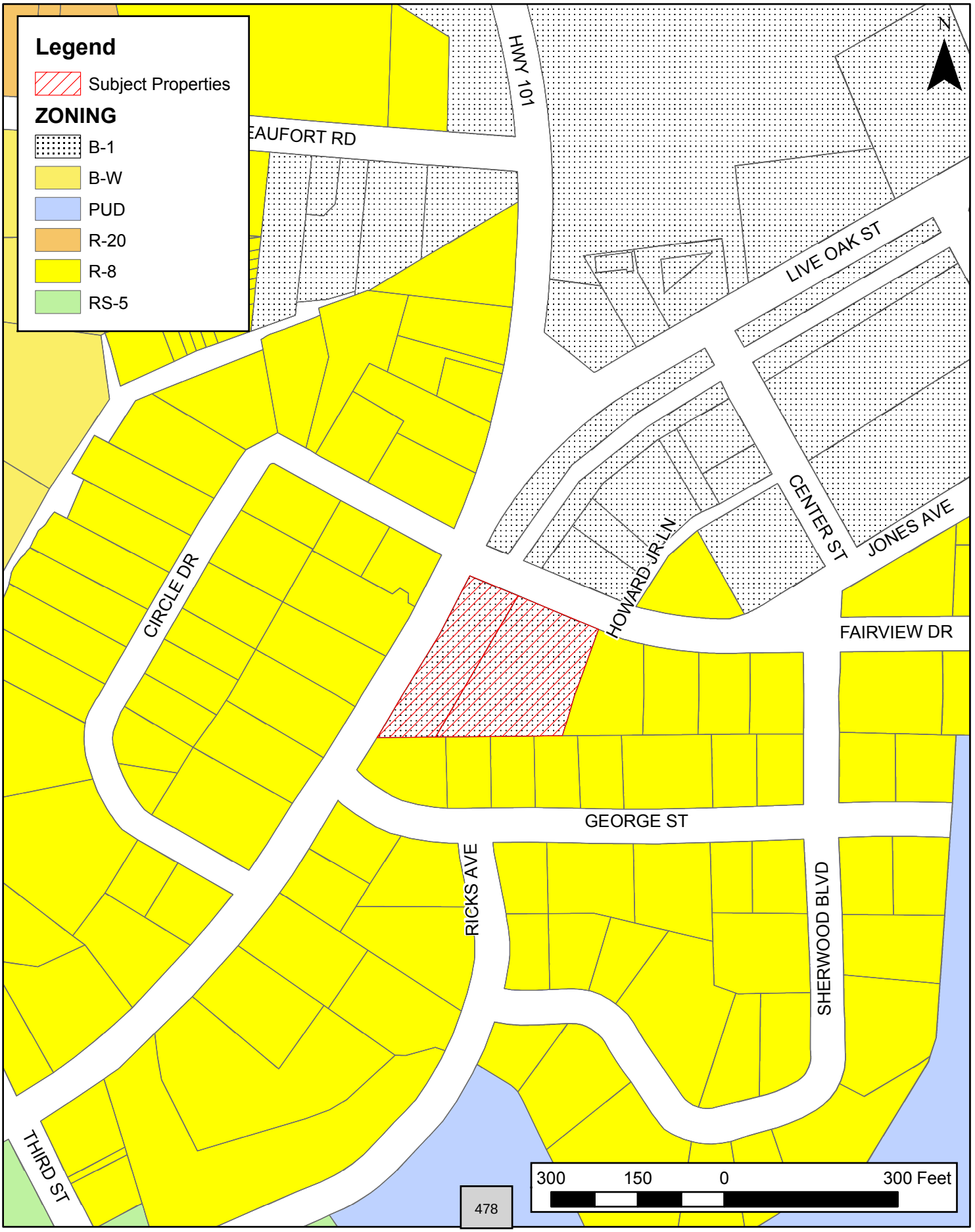
Case No. 21-18



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Zoning Map

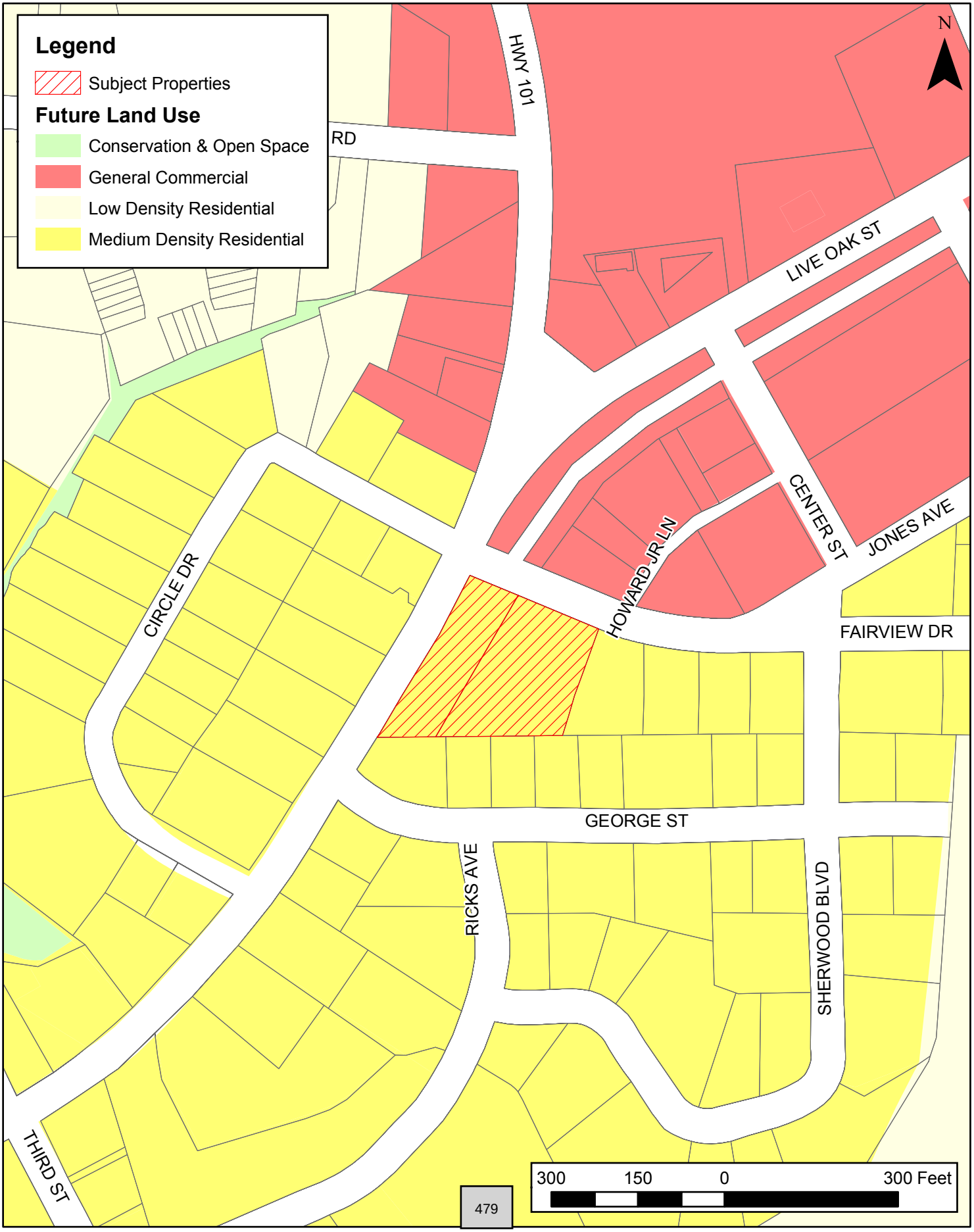
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Future Land Use Map

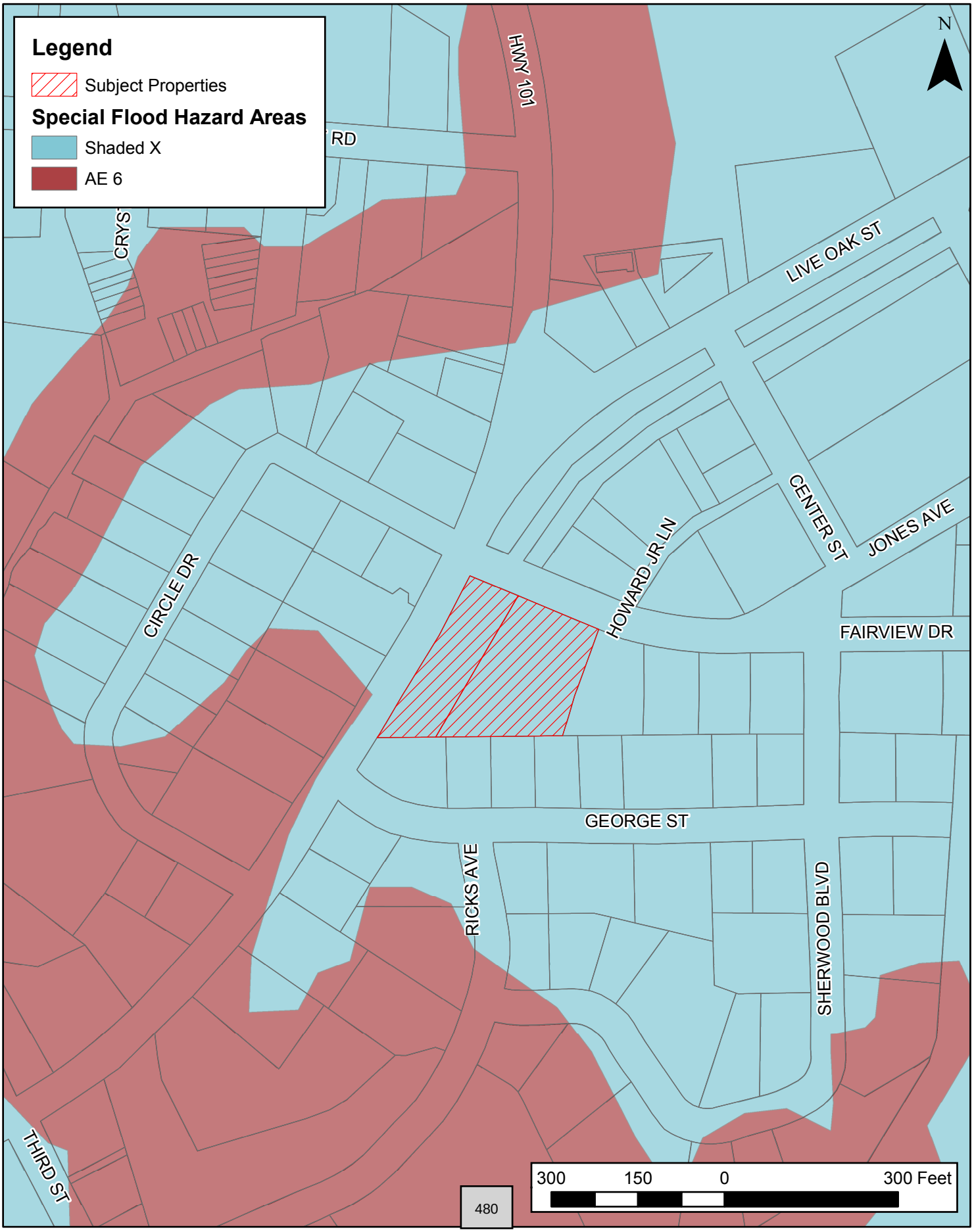
Case No. 21-18



06042021

Case No. 21-18

Special Flood Hazard Areas Map



06042021

C) ***B-1 General Business District.***

The General Business District is established as the district in which a wide variety of sales and service facilities may be provided to the general public. This district will be located throughout the Town's planning jurisdiction.

1) Minimum Lot Size.
All lots in the B-1 district shall be a minimum of five thousand square feet (5,000 ft^2).

2) Minimum Lot Width.
All lots in the B-1 district shall have a minimum lot width of sixty feet (60') at the minimum building line.

3) Building Setback and Building Height Requirements and Limitations.
Subject to the exceptions allowed in this Ordinance, each structure on a lot in this zoning district shall be set back from the boundary lines of the lot at least the distances provided in the tables set forth in this section. The building height limitation in this district is provided in the tables set forth in this section.

Table 9-5 Lot Requirements

District	*Front Setback (Right-of-Way)*	*Rear Setback*	*Side Setback*	*Building Height Limitation*
B-1	30 feet	15 feet	15 feet	40 feet

4) Accessory Building Setback Requirements.
All accessory buildings must comply with the setback requirements as set forth in section 2-F of this Ordinance, section 6 of this Ordinance, section 15 of this Ordinance, and all sections of this Ordinance.

5) Permitted Uses.

Amusement Establishment
Antenna Co-Location on Existing Tower
Aquaculture
Assisted Living
Athletic Field, Public
Bed & Breakfast
Boat Sales/Rentals
Car Wash
Club, Lodge, or Hall
Commercial Indoor Recreation Facility
Community Garden
Concealed (Stealth) Antennae & Towers
Convenience Store
Day Care Center
Dock
Dry Boat Storage
Financial Institution
Government/Non-Profit Owned/ Operated Facilities & Services
Hospital
Hotel or Motel
Kennel, Indoor Operation Only
Library
Liquor Store
Moped/Golf Cart Sales/Rentals
Mortuary/Funeral Home/Crematorium
Motor Vehicle Sales/Rentals
Museum
Neighborhood Recreation Center, Public
Nursing Home
Office: Business, Professional, or Medical

Other Building-Mounted Antennae & Towers
Outdoor Retail Display/Sales
Park, Public
Parking Lot
Parking Structure
Personal Service Establishment
Pool Hall or Billiard Hall
Produce Stand/Farmers' Market
Public Safety Station
Public Utility Facility
Religious Institution
Resource Conservation Area
Restaurant with Drive-Thru Service
Restaurant with Indoor Operation
Retail Store
Satellite Dish Antenna
Signs, Commercial Free-Standing
Tavern/Bar/Pub with Indoor Operation
Temporary Construction Trailer
Theater, Small
Transportation Facility
Utility Minor
Vehicle Charging Station
Vehicle Service

6) Special Uses (*Special Uses* text may be found in section 20 of this Ordinance).

Adult-Oriented Retail Establishment
Commercial Outdoor Amphitheater
Commercial Outdoor Recreation Facility
Commercial Waterfront Facility
Gas/Service Station
Golf Driving Range
Hazardous Material Storage
Kennel, Indoor/Outdoor Operation
Manufacturing, Light
Marina
Microbrewery
Microdistillery
Mini-Storage
Mixed Use
Outdoor Amphitheater, Public
Outdoor Storage
Preschool
Restaurant with Outdoor Operation
School, K-12
School, Post-Secondary
Tavern/Bar/Pub with Outdoor Operation
Theater, Large
Utility Facility
Wholesale Establishment

SECTION 8 Transitional Zoning Districts

A) ***TCA Townhomes, Condominiums, Apartments District.***
This district is established to provide a high density district in which the primary uses are multi-family residences and duplexes. Uses in this district which require potable water or sanitary sewer must be connected to both municipal water and municipal sewer.

1) Maximum Overall Density.
The TCA district shall have a maximum density of twelve units per acre.

2) Minimum Lot Size.
All lots in the TCA district shall be a minimum of two thousand, seven hundred, and fifty square feet (2,750 ft^2) per dwelling unit.

3) Minimum Lot Width.
All lots in the TCA district shall have a minimum lot width of eighty feet (80') at the minimum building line.

4) Building Setback and Building Height Requirements and Limitations.
Subject to the exceptions allowed in this Ordinance, each structure on a lot in this zoning district shall be set back from the boundary lines of the lot at least the distances provided in the tables set forth in this section. The building height limitation in this district is provided in the tables set forth in this section.

Table 8-1 Interior Lot Requirements

District	*Front Setback (Right-of-Way)*	*Rear Setback*	*Side Setbacks*	*Building Height Limitation*
TCA	25 feet	25 feet	8 feet	35 feet

Table 8-2 Corner Lot Requirements

District	*Designated Front (Right-of-Way) Setback*	*Designated Side (Right-of-Way) Setback*	*Rear Setback*	*Side Setback*	*Building Height Limitation*
TCA	25 feet	15 feet	30 feet	8 feet	35 feet

Table 8-3 Double Frontage Lot Requirements

District	*Designated Front (Right-of-Way) Setback*	*Designated Rear (Right-of-Way) Setback*	*Side Setbacks*	*Building Height Limitation*
TCA	25 feet	15 feet	8 feet	35 feet

5) Accessory Building Setback Requirements.
All accessory buildings must comply with the lot setback requirements as set forth in section 2-F, section 6, section 15, and all the other sections of this Ordinance.

6) Covenants.

In any development proposing common areas, jointly-used structures, or private streets, restrictive and protective covenants which provide for party wall rights, harmony of external design, continuing maintenance of building exteriors, grounds, or other general use improvements and similar matters, shall be submitted to the Town and approved by the BOC. Condominium development must submit evidence of compliance with the North Carolina Condominium Act.

7) Permitted Uses.

Antenna Co-Location on Existing Tower
Assisted Living
Athletic Field, Public
Carport
Community Garden
Concealed (Stealth) Antennae & Towers
Dock
Dormitory
Dwelling, Duplex/Townhome
Dwelling, Multi-Family
Garage, Private Detached
Government/Non-Profit Owned/ Operated Facilities & Services
Group Home
Home Occupation
Neighborhood Recreation Center Indoor/Outdoor, Private
Neighborhood Recreation Center, Public
Nursing Home
Park, Public
Public Safety Station
Public Utility Facility
Resource Conservation Area
Shed
Signs, Commercial Free-Standing
Temporary Construction Trailer
Utility Minor
Vehicle Charging Station

8) Special Uses (*Special Uses* text may be found in section 20 of this Ordinance).

Athletic Field, Private
Dwelling, Single-Family
Golf Course, Privately-Owned
Golf Driving Range
Hotel or Motel
Marina
Mixed Use
Outdoor Amphitheater, Public
Personal Service Establishment
Preschool
Religious Institution
Restaurant with Drive-Thru Service
Restaurant with Indoor Operation
Restaurant with Outdoor Operation
Retail Store
Satellite Dish Antennas
School, Post-Secondary
Tavern/Bar/ Pub with Indoor Operation
Tavern/Bar/ Pub with Outdoor Operation
Theater, Small
Transportation Facility
Utility Facility

THE CULLIPHER GROUP, P.A.
ENGINEERING & SURVEYING SERVICES

HESTRON PLAZA TWO
151-A NC HWY 24
MOREHEAD CITY, NC 28557
P:(252) 773-0090
F:(252) 773-0243

LETTER OF TRANSMITTAL

To:
Town of Beaufort

DATE June 1, 2021
JOB NO. PM1070~012
ATTENTION Kyle Garner
RE: 100 Fairview Drive & 1310 Live Oak Street
Rezoning Request

WE ARE SENDING YOU:

COPIES	DATE	NO.	DESCRIPTION
1	5/28/2021	30273831	Fee $300.00
1	5/27/2021		Application for an Amendment to the Beaufort Zoning Map
1			Rezoning Request
12	5/27/2021	R.0	Rezoning Request B-1 to TCA Map

THESE ARE TRANSMITTED as checked below:

- ☑ For approval
- ☐ For your use
- ☐ As requested
- ☐ FOR BIDS DUE _____
- ☐ PRINTS RETURNED AFTER LOAN TO US
- ☐ Resubmit _____copies for approval
- ☐ Submit _____copies for distribution
- ☐ For review and comment

REMARKS Rezoning request for planning board approval. Please contact Ron Cullipher with any questions or comments. Thank you.

COPY TO_____

SIGNED_____

21-18

1.

Town of Beaufort
701 Front St. • P.O. Box 390 • Beaufort, N.C. 28516
252-728-2141 • 252-728-3982 fax
www.beaufortnc.org

APPLICATION FOR AN AMENDMENT TO THE BEAUFORT ZONING MAP

Instructions:

Please complete the application below, include all the required attachments and the **$300.00 for Rezoning request with no Land Use Plan Change** or **$400.00 for Rezoning Request with Land Use Plan Change** and return to the Beaufort Town Hall, 701 Front Street or P.O. Box 390, Beaufort, N.C., 28516. Incomplete applications will not be processed and **will be** returned to the applicant. Please contact Planning and Inspections at 252-728-2142 if there are any questions.

APPLICANT INFORMATION

Applicant Name: PAMLICO LIMITED PARTNERSHIP

Applicant Address: 308 SHEEP POINT ROAD BEAUFORT, NC 28516

Phone Number: 252-723-9210 Email: JTAYLOR3FT NC@gmail.com

Property Owner Name: BEAUFORT PROPERTIES - NM, LLC

Address of Property Owner: 1131-B MILITARY CUTOFF RD WILMINGTON, NC 28405

Phone Number: 910 256 2211 x 1125 Email: JASON@SWAINASSOCIATES.COM

PROPERTY INFORMATION

Property Address: 100 FAIRVIEW DR + 1310 LIVE OAK STREET

15-Digit PIN: 7306 1562 6574 000 + 7306 1562 5554 0000 Lot/Block Number:

Size of Property (in square feet or acres): 0.936 Acres + 0.653

Current Zoning: B-1 Requested Zoning: TCA

Current Use of Property: ☐ Residential ☑ Vacant ☐ Commercial ☐ Other:

Jack Taylor — 5-27-2021

Applicant Signature — Date of Applicant's Signature

[signature] — 5/25/2021

Property Owner Signature (if different than applicant) — Date of Owner's Signature

An application fee of **$300.00 for Rezoning request with no Land Use Plan Change** or **$400.00 for Rezoning Request with Land Use Plan Change**, either in cash, money order, or check made payable to the "Town of Beaufort," should accompany this application. Payments can be made in person on the day of submittal and at such time, a credit card can be used to make the payment. Credit card payments are subject to a 3% extra fee.

REZONING REQUEST

1310 LIVE OAK ST & 100 FAIRVIEW DR.

BEAUFORT, NORTH CAROLINA

CURRENT ZONING B-1 COMMERCIAL

PROPOSED ZONING TCA- TOWNHOMES, CONDOMINIUMS AND APARTMENTS

PROPERTY OWNER:	BEAUFORT PROPERTIES- NM, LLC PO BOX 10189 WILMINGTON, NC 28404
APPLICANT:	PAMPLICO LIMIITED PARTNERSHIP JACK TAYLOR
PIN NO.S	730615625546000, 73061526574000

BACKGROUND: THESE PROPERTIES ARE THE FORMER LOCATION OF A GAS STATION THAT WAS DEMOLISHED SOMETIME AFTER 2004. THE PROPERTY HAS REMAINED VACANT SINCE THAT TIME. THESE PROPERTIES WERE A PORTION OF JONES VILLAGE AS PLATTED IN 1956. THE TOWN OF BEAUFORT APPEARS TO HAVE INSTALLED THEIR FIRST WASTEWATER TREATMENT PLANT IN 1969, WELL AFTER JONES VILLAGE WAS PLATTED. LOT SIZES IN THIS AREA WOULD HAVE REQUIRED SEPTIC SYSTEMS AT THAT TIME AND AS SUCH REQUIRED LARGER LOT SIZES TO ACCOMMODATE THE SEPTIC SYSTEMS.

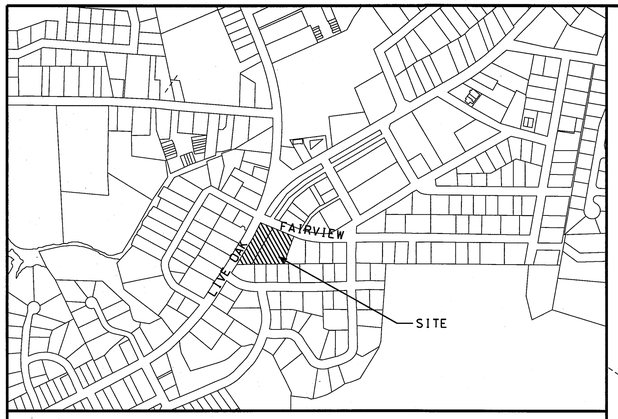
THESE PROPERTIES ARE CURRENTLY ZONED B-1 WHICH ADJOINS R-8 PROPERTY TO THE EAST, SOUTH AND WEST (WEST BEING ACROSS LIVE OAK STREET) ALONG WITH B-1 PROPERTY TO THE NORTH. THE B-1 ZONE COMMERCIAL ZONE ALLOWS FOR A LOT OF HIGH INTENSITY USES WHILE THE PROPOSED TCA ZONING WOULD BE MORE RESTRICTIVE AND A BETTER TRANSITION ABUTTING THE R-8 ZONING.

FUTURE LAND USE PLAN: THE TOWN OF BEAUFORT FUTURE LAND USE PLAN SHOWS THIS AREA AS A MEDIUM DENSITY RESIDENTIAL AREA. SO, THE TRANSITION FROM COMMERCIAL TO RESIDENTIAL WAS IDENTIFIED AS A GOAL IN THE LATEST PLAN. THE MEDIUM DENSITY RESIDENTIAL IS DESCRIBED AS 3 TO 5 UNITS PER ACRE BUT DOESN'T SPECIFICALLY TAKE INTO ACCOUNT THAT PROPERTIES THAT HAVE MUNICIPAL SEWER CAPABILITY WOULD SUPPORT HIGHER DENSITIES. TCA ZONING DISTRICTS APPEAR TO HAVE BEEN CREATED AFTER THE CURRENT LAND USE PLAN. SEVERAL PROPERTIES HAVE BEEN REZONED TO TCA WITH DENSITIES UPTO 12 UNITS/ACRE. SHOULD THE REZONING BE APPROVED THE PLAN WOULD BE TO UTILIZE THE UPPER LIMITS OF THE ALLOWABLE DENSITY. THE LAND USE PLAN IS FROM 2006 AND THE NEW ZONING ORDINANCE WAS ADOPTED IN 2013 SO THE LUP DID NOT IDENTIFY THE OPPORTUNITIES FOR MORE FLEXIBILTY IN RESIDENTIAL USES.

PROMOTE PUBLIC HEALTH, SAFETY OR GENERAL WELFARE FOR THE TOWN OF BEAUFORT: THESE COMMERCIAL PROPERTIES IF REZONED TO TCA WOULD ALLOW MULTI-FAMILY DEVELOPMENT TO BE CONSTRUCTED TO CURRENT BUILDING CODES AND ZONING ORDINANCES WHICH ARE DESIGNED TO PROMOTE PUBLIC HEALTH AND SAFETY FOR THE TOWN OF BEAUFORT.

Property Owners within 100' of
100 Fairview Drive (730615626574000) & 1310 Live Oak Street (730615625546000)

1.	Annie L Jones Company Inc NCPIN: 730615627985000	120 Jericho Drive Beaufort, NC 28516
2.	Morris Family Ventures LLC NCPIN: 730615627791000	PO Box 12587 New Bern, NC 28561
3.	WPJS Properties LLC NCPIN: 730615629659000	PO Box 88 Winterville, NC 28590
4.	Bickley, Jennifer Lynn NCPIN: 730615628524000	102 Fairview Drive Beaufort, NC 28516
5.	Boyette, Trent Christian etal NCPIN: 730615629513000	104 Fairview Drive Beaufort, NC 28516
6.	Garris, Robert J Sr. etux Karen NCPIN: 730619628305000	108 Poplar Ridge Road Goldsboro, NC 27534
7.	Garner, Eugene M Jr. etux Dianne NCPIN: 730619627325000	173 Jackson Drive Beaufort, NC 28516
8.	Dixon, Joseph Carl NCPIN: 730619626345000	201 George Street Beaufort, NC 28516
9.	Hill, George Stephen NCPIN: 730619625376000	1904 Snowy Egret Drive Morehead City, NC 28557
10.	Tarr, Cynthia Rae NCPIN: 730619624396000	1322 Hwy 101 Beaufort, NC 28516
11.	Schmidt, Alva R etux Diane NCPIN: 730619622319000	1305 Live Oak Street Beaufort, NC 28516
12.	Darress, Robert L etux Maria L NCPIN: 730619622486000	1307 Live Oak Street Beaufort, NC 28516
13.	Beaufort Proper Holdings LLC NCPIN: 730615623517000	2441 Hwy 70 E Beaufort, NC 28516
14.	Recker, Brian E etux Emily W NCPIN: 730615623655000	1311 Live Oak Street Beaufort, NC 28516
15.	Crobar, Sandra K NCPIN: 730615624752000	128 Circle Drive Beaufort, NC 28516
16.	O'Berry, Walter S IV etux M NCPIN: 730615624897000	127 Circle Drive Beaufort, NC 28516



VICINITY MAP
NOT TO SCALE

OWNER N/F
CROBAR, SANDRA K
NCPIN 730615624752000
ZONED R8

OWNER N/F
ANNIE L JONES COMPANY INC
NCPIN 730615627985000
ZONED B1

OWNER N/F
MORRIS FAMILY VENTURES LLC
NCPIN 730615627791000
ZONED B1

NORTH

MB3 PG 154

OWNER N/F
RECKER, BRIAN E
ETUX EMILY W
NCPIN 730615623655000
ZONED R8

OWNER N/F
BEAUFORT PROPER HOLDINGS LLC
NCPIN 730615623517000
ZONED R8

LIVE OAK STREET
60' R/W

80.19 N32°57'10"E

95.83 S61°44'26"E

FAIRVIEW DRIVE
60' R/W

149.99 S61°44'26"E

228.82 N36°31'31"E

CAROLINA AVENUE

UNDEVELOPED
QUIT CLAIM DB1222 PG 74

276.73 N38°26'32"E

OLD LOT LINE

OLD LOT LINE

193.59 S27°53'01"W

OWNER N/F
DARRESS, ROBERT L
ETUX MARIA L
NCPIN 730619622486000
ZONED R8

OWNER N/F
BICKLEY, JENNIFER LYNN
NCPIN 730615628524000
ZONED R8

COPY OF SURVEY PROVIDED TO THE CULLIPHER GROUP, P.A.
ENTITLED BOUNDARY SURVEY FOR TURTLE CREEK(PHASE III), LLC
PREPARED BY TIMMONS GROUP ISSUED AND SEALED BY KENT J. FRANKLIN
ON JUNE 14,2007

92.82 N83°13'22"W

215.13 N83°13'22"W

OWNER N/F
TARR, CYNTHIA RAE
NCPIN 730619624396000
ZONED R8

OWNER N/F
HILL, GEORGE STEPHEN
NCPIN 730619625376000
ZONED R8

OWNER N/F
DIXON, JOSEPH CARL
NCPIN 730619626345000
ZONED R8

OWNER N/F
GARNER, EUGENE M JR
ETUX KAREN
NCPIN 730619628305000
ZONED R8

20 10 0 20 40
SCALE:1"=20'

REVISIONS:

No.	BY	DATE	DESCRIPTION

REZONING REQUEST B-1 TO TCA

1310 LIVE OAK ST &
100 FAIRVIEW DR.

BEAUFORT TWSP., CARTERET COUNTY, NORTH CAROLINA

OWNER: BEAUFORT PROPERTIES-NM, LLC

ADDRESS: PO BOX 10189
WILMINGTON, NC 28404

DESIGNED: RDC
DRAWN: RDC
CHECKED: RDC
APPROVED: RDC
DATE: 5/27/21
SCALE: 1"=20'

THE CULLIPHER GROUP, P.A.
ENGINEERING & SURVEYING SERVICES
151A HIGHWAY 24
MOREHEAD CITY, N.C. 28557
(252) 773-0090
LICENSE NO. C-1482

NORTH CAROLINA PROFESSIONAL SEAL 13343 ENGINEER RONALD D CULLIPHER

RONALD D. CULLIPHER P.E.

SHEET # 1 OF 1
PROJECT #:PM1070-012
DESIGN FILE #:TURTLE CREEK/REZONING MAP.DGN

BEAUFORT BOARD OF COMMISSIONERS
AN ORDINANCE TO REZONE
100 FAIRVIEW DRIVE AND 1310 LIVE OAK STREET FROM B-1 to TCA
ORDINANCE NO. 21-__

Applicant:	Pamlico Limited Partnership
Location:	100 Fairview Drive and 1310 Live Oak Street
Parcel ID:	730615626574000, 730615625546000
Lot Size:	1.589 acres or 69,216.84 Sq. ft. Total (based on GIS data)
Existing District:	B-1 General Business District
Meeting Date:	August 9, 2021
Requested District:	TCA – Townhomes, Condominiums and Apartments

WHEREAS, the Pamlico Limited Partnership has submitted a request to rezone the above referenced property to TCA; and

WHEREAS, the Beaufort Planning Board has convened to consider and prepare a recommendation and consistency statement on the request at its meeting on June 21, 2021, at which time the Planning Board recommended approval of the request; and

WHERAS, the Beaufort Board of Commissioners conducted a public hearing on August 9, 2021 at which time the applicant and/or applicant's representative was given the opportunity to present arguments, and Town staff was given the opportunity to comment on the application; and

WHEREAS, the Town Board of Commissioners has made the following findings and conclusions:

1. The request is consistent with surrounding land use patterns and zoning in the area.
2. The proposed zoning of TCA is inconsistent with the CAMA Core Land Use Plan, however the Board finds the requested TCA District is consistent with the spirit and intent of the ordinance.

NOW, THEREFORE, IT IS HEREBY ORDAINED by the Board of Commissioners on the basis of the foregoing findings and conclusions that the request to rezone 100 Fairview Drive and 1310 Live Oak Street is approved and the Town's Zoning Map is amended accordingly.

Enacted on motion of Commissioner _____ and carried on a vote of ___ in favor and ___ against.

This, the 9th day of August 2021

TOWN OF BEAUFORT

_____
Everette (Rett) Newton, Mayor

_____
Allen Coleman, Town Clerk

RESOLUTION OF THE BOARD OF COMMISSIONERS OF THE TOWN OF BEAUFORT, NORTH CAROLINA, AUTHORIZING AN AMENDMENT TO THE CAMA LAND USE PLAN

WHEREAS, the Town of Beaufort desires to amend its CAMA Land Use Plan, specifically the map related to Future Land Use, and

WHEREAS, the CAMA Land Use Plan currently shows Medium Density Residential at 100 Fairview Drive (PIN 730615626574000) and 1310 Live Oak Street (PIN 730615625546000); and,

WHEREAS, the Town of Beaufort desires to amend the CAMA Land Use Plan to High Density Residential for the aforementioned area; and

WHEREAS, on June 21, 2021 the Planning Board recommended approval of the draft amendment to the CAMA Land Use Plan; and

WHEREAS, the Town of Beaufort conducted a duly advertised public hearing on the draft amendment to the CAMA Land Use Plan at the Regular Meeting of the Board of Commissioners on August 9, 2021; and

WHEREAS, at the Regular Meeting on August 9, 2021 the Board of Commissioners of the Town of Beaufort, North Carolina found the draft amendment to be consistent with the Town of Beaufort's desired vision for the future and approved to adopt the draft amendment; and

WHEREAS, the adopted Plan will be submitted as required by state law to the District Planner for the Division of Coastal Management under the North Carolina Department of Environmental Quality and forwarded to the Division Director; and

WHEREAS, a review of the adopted draft amendment by the Director of the NC Division of Coastal Management will be undertaken; and the Director will then certify the Town's land use plan amendment;

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of Beaufort, North Carolina, that the Future Land Use Map in the CAMA Land Use Plan be amended as follows:

> 100 Fairview Drive and 1310 Live Oak Street identified as High Density Residential on the CAMA Core Land Use Plan Future Land Use Map

BE IT FURTHER RESOLVED that the Board of Commissioners of Beaufort, North Carolina, has adopted the draft amendment; and

BE IT FURTHER RESOLVED that the Town Planner of the Town of Beaufort is hereby authorized to submit the adopted CAMA Land Use Plan draft amendment to the State for certification as described above.

Adopted this 9th day of August, 2021.

_____

Everette (Rett) Newton, Mayor

_____

Allen Coleman, Town Clerk

Town of Beaufort, NC

701 Front St. – P.O. Box 390 – Beaufort, N.C. 28516
252-728-2141 – 252-728-3982 fax – www.beaufortnc.org

Board of Commissioners
Virtual Regular Meeting
6:00 PM – Monday, August 9, 2021

AGENDA CATEGORY: Quasi-Judicial Hearing

SUBJECT: Request for Special Use Permit – 1550 Lennoxville Road - Gas-Service Station (Jim Dandy Stores); Case No. 21-17

BRIEF SUMMARY:

The applicant has submitted a Special Use Permit to operate a Gas/Service Station on a 0.478 acre lot located at 1550 Lennoxville Road.

At their June 21, 2021 meeting the Planning Board recommended 3 to 1 to deny the Special Use Permit with the conditions that the applicant provide a Transportation Impact Analysis and Environmental Assessment of the site.

REQUESTED ACTION:

The Planning and Inspections Director recommends the Board conduct a quasi-judicial hearing, receive evidence and testimony from individuals with standing, close the hearing, and consider voting to approve, approve with conditions, or deny the special use permit request.

EXPECTED LENGTH OF PRESENTATION:

30 Minutes

SUBMITTED BY:

Kyle Garner, AICP

Planning & Inspections Director

BUDGET AMENDMENT REQUIRED:

N/A

STAFF REPORT

To: The Honorable Mayor & Board of Commissioners

From: Kyle Garner, AICP, Planning Director

Date: July 21, 2021

Case No.: 21-17

THE REQUEST: Special Use Permit for Jim Dandy Gas/Service Station

BACKGROUND:

Location:	1550 Lennoxville Road
Owner:	Sara Austin
Applicant:	Jim Dandy Stores
CAMA Land Use:	Medium Density Residential
PIN:	730507699596000
Size:	.478 Acres
Existing Land Use:	Austin vet. Clinic
Adjoining Land Use & Zoning:	North - Single-Family Residences; Zoned R-8 (Briar Patch) South – Beaufort Walk Subdivision – Zoned TR (Transitional) West – The Oaks Subdivision - Zoned RC-5 East – Single-Family Residences; Zoned R-8 (Ocean)

SPECIAL INFORMATION: This request will require an evidentiary hearing with presenters providing evidence, exhibits and testimony for the Board consideration when making their specific findings of fact for the Special Use Permit.

Public Utilities:	Water	Existing Service
	Sanitary Sewer	Existing Service

ACTION:

1. Conduct Quasi-Judicial Hearing
2. Make findings of fact based on evidence, exhibits and testimony provided.
3. Approve/Deny the Special Use Permit based on Findings of Fact
4. Table decision until future meeting

Exhibit - A

COMMENTS:

Section 6-F - Height & Area Supplements & Exceptions allows the encroachment of the canopy to the property line (Lennoxville Road) See Section 6-F Exhibit.

Section 20-B - Special Use Permits (Special Use Permit Application Procedures) requires a complete application to include a site plan.

This item was discussed for about 2 hours at the July 19, 2021 Planning Board Meeting. About 15 property owners/residents expressed their concerns and provided information to the Board members to aid in their recommendation to the Board of Commissioners. After hearing from all parties the Planning Board voted 3 to 1 to recommend denial of the Special Use Permit to the Board of Commissioner's.

The Planning Board did offer the applicant the opportunity to resubmit the proposed site plan with the correct building height of the existing structure and address how it relates to other adopted plans as well as updating the application representing the actual request. Also, as part of their recommendation the Planning Board suggested that the applicant conduct a Traffic Impact Analysis (TIA) and an Environmental Assessment for the proposed site and submit that information to the Board of Commissioners.

SECTION 20 Special Use Permit (*Town of Beaufort Land Development Ordinance*)

E) Required Findings

1) In addition to any other findings or requirements as specified by any other section of this Ordinance, before any application for a special use may be granted or denied, the BOC shall make each of the following findings:

a) The proposed use is an allowable special use in the zoning district it is being located within;

b) The application is complete;

c) The location and character of the use will be in conformity with the Town's land use plan and other comprehensive planning elements;

d) Streets, driveways, parking lots, traffic control, and any other traffic circulation features shall be designed and provided in accordance with current traffic engineering standards and Town regulations and found to be adequate for the proposed special use;

e) The proposed special use will not substantially injure the value of adjoining or abutting properties;

f) The proposed special use will be compatible and in harmony with adjoining land uses and the development patterns of the immediate area; and,

g) The proposed use will not materially endanger the public health or safety of the community if located where proposed and developed according to the submitted and approved plan.

CAMA Core Land Use Plan

Generally, growth and land development is anticipated to occur in all future land use categories except for the Conservation/Open Space classification. The type and density/intensity of projected development varies within each Future Land Use Map classification. Future Land Use projections are delineated in Figure 8, Future Land Use Map. The Future Land Use Map classifications are considered part of the Land Use Plan's policy.

Future Land Use Map Classifications

- **Medium Density Residential Classification.** The Medium/High Density Residential classification encompasses approximately 0.8 square miles (483 acres) or about 10 Percent of the total planning jurisdiction. The majority of the properties classified as Medium Density Residential are generally located immediately surrounding the Beaufort downtown area as well as north and east of the downtown area.

- The Medium Density Residential classification is intended to delineate lands where the predominant land use is higher density single-family residential developments and/or two-family developments. The residential density within this classification is generally 3 to 5 dwelling units per acre. Minimum lot sizes vary from 8,000 to 10,000 square feet unless a larger minimum lot area is required by the health department for land uses utilizing septic systems. Land uses within Medium Density Residential designated areas are generally compatible with the R-10, One or Two-family Residential; R-10MH, Single-family Residential and Manufactured Home; R-8, Medium Density Residential; and R-8A Single-family Medium Density Residential zoning districts. Public water is widely available and sewer service is required to support the higher residential densities in this classification. Streets with the capacity to accommodate higher traffic volumes are also necessary to support Medium Density Residential development.

- The Town's goals and policies support the use of land in Medium Density-classified areas for single-family and two-family dwellings where adequate public utilities and streets are available or can be upgraded to support the higher residential densities encouraged in this classification.

Use of the Future Land Use Plan Map to Guide Development

In preparing the Future Land Use Map, consideration was given to land development objectives and policies, land suitability, and the ability to provide the infrastructure to support growth and development. The Future Land Use Map depicts the general location of projected patterns of future land uses. The Future Land Use Map is a plan or guideline for the future.

The ultimate use and development of a particular parcel of land will be determined by property owners' desires, overall market conditions, implementation tools employed by the Town to regulate land use and development (such as the Town's zoning ordinance, subdivision regulations, flood hazard regulations), the absence of specific natural constraints to development, and the availability of the necessary infrastructure (water, sewer, roads, etc.) to support development. Consequently, even though the Future Land Use Map may indicate a specific projected use in a

particular location, many factors come into play to determine if the projected use is appropriate and the land can be developed as projected. Also, formal amendments to the zoning ordinance and subdivision ordinance will be required to specifically authorize the type of mixed use development envisioned in this Land Use Plan.

Achieving the projected patterns of land use indicated by the Future Land Use Map will be greatly impacted by timing. Much of the projected land use indicated on the Future Land Use Map will not come to fruition without market demand. Therefore, market and economic conditions must be conducive for growth and development. While the Land Use Plan attempts to provide a general expectation of growth based upon projected population change, it simply cannot predict the economic future. The demand for houses, businesses, industries, etc. will fluctuate widely with economic conditions.

The timing of the provision of infrastructure improvements, particularly water and sewer services and roads, will also have a tremendous impact on growth and development. Development will occur where infrastructure is available or can be made available to sustain that development. Consequently, achieving the Future Land Use Map land use projections will depend in large part upon if and when infrastructure is provided. The provision of public infrastructure depends upon the capability to provide the service and demand for the service. Economic climate will be a major factor in both the capability to make infrastructure available and the level of service demand (*Core Land Use Plan*, Section IV: Plan for the Future, pg. 100).

Guide for Land Use Decision Making

The Land Use Plan, as adopted by the elected officials of the Town of Beaufort and as may be amended from time to time, will serve as the primary guide upon which to make land use policy decisions. Every land use policy decision, such as a rezoning request or approval of a conditional or special use permit, will be measured for consistency with the goals, policies, and recommendations of the Plan. The elected officials, Planning Board, Board of Adjustment, and Town staff should utilize the Land Use Plan as the basic policy guide in the administration of the zoning ordinance, subdivision regulations, and other land development regulatory tools. Persons involved in the land development business as well as the general public can also utilize the Land Use Plan to guide private decisions regarding land use and land development.

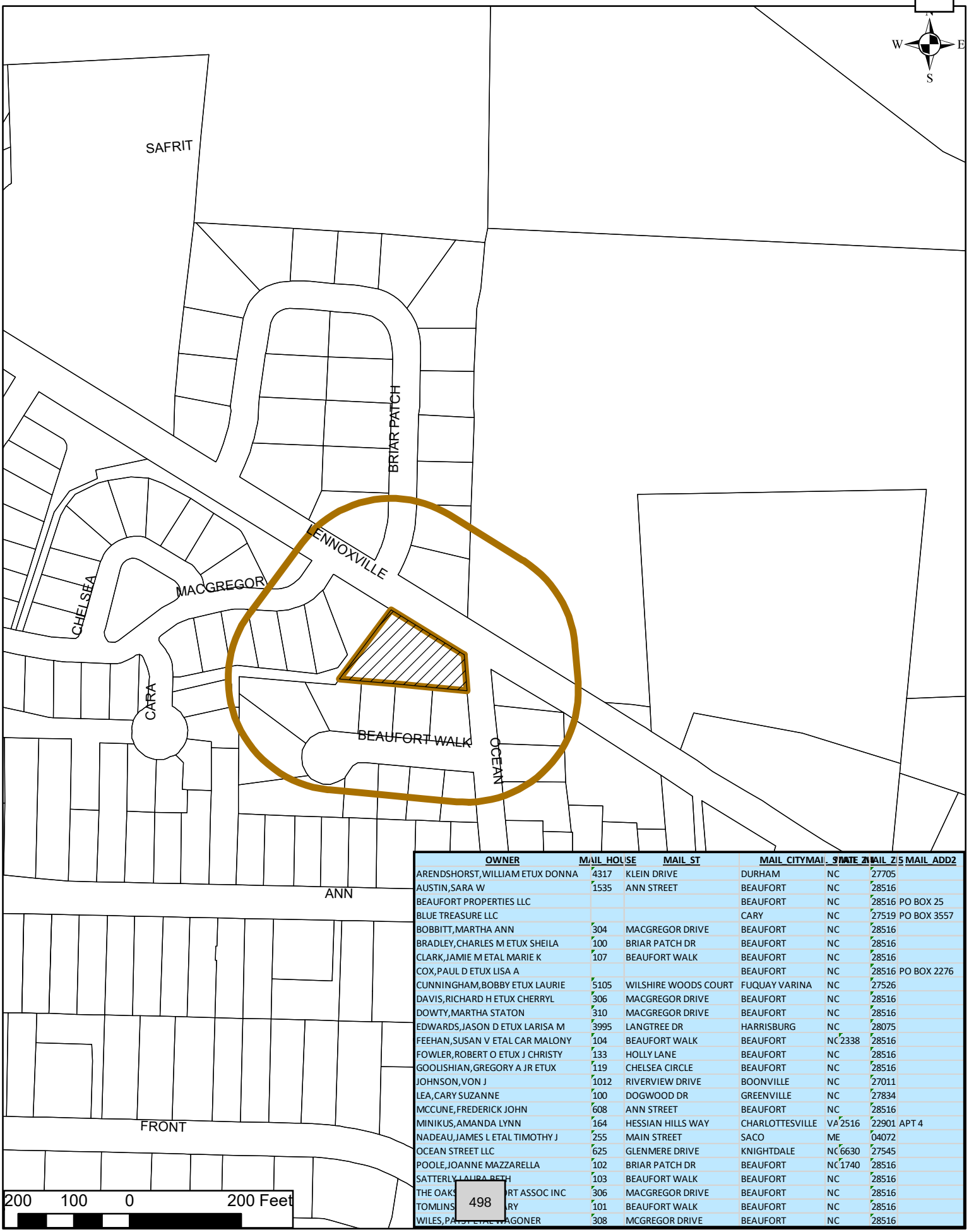
The policy statements and recommendations of the Land Use Plan can also be of assistance to the elected officials in making long-range decisions regarding such matters as the provision of municipal services, thoroughfare planning, storm water planning and management, implementation of economic development strategies, recreational facility planning, and preparation of capital and operating budgets.

It should be noted, however, that the Land Use Plan is one of a variety of guides in making a public policy decision. The Plan should be viewed as a tool to aid in decision making and not as the final decision (*Core Land Use Plan*, Section V: Tools for Managing Development, pg. 102).

Exhibits:

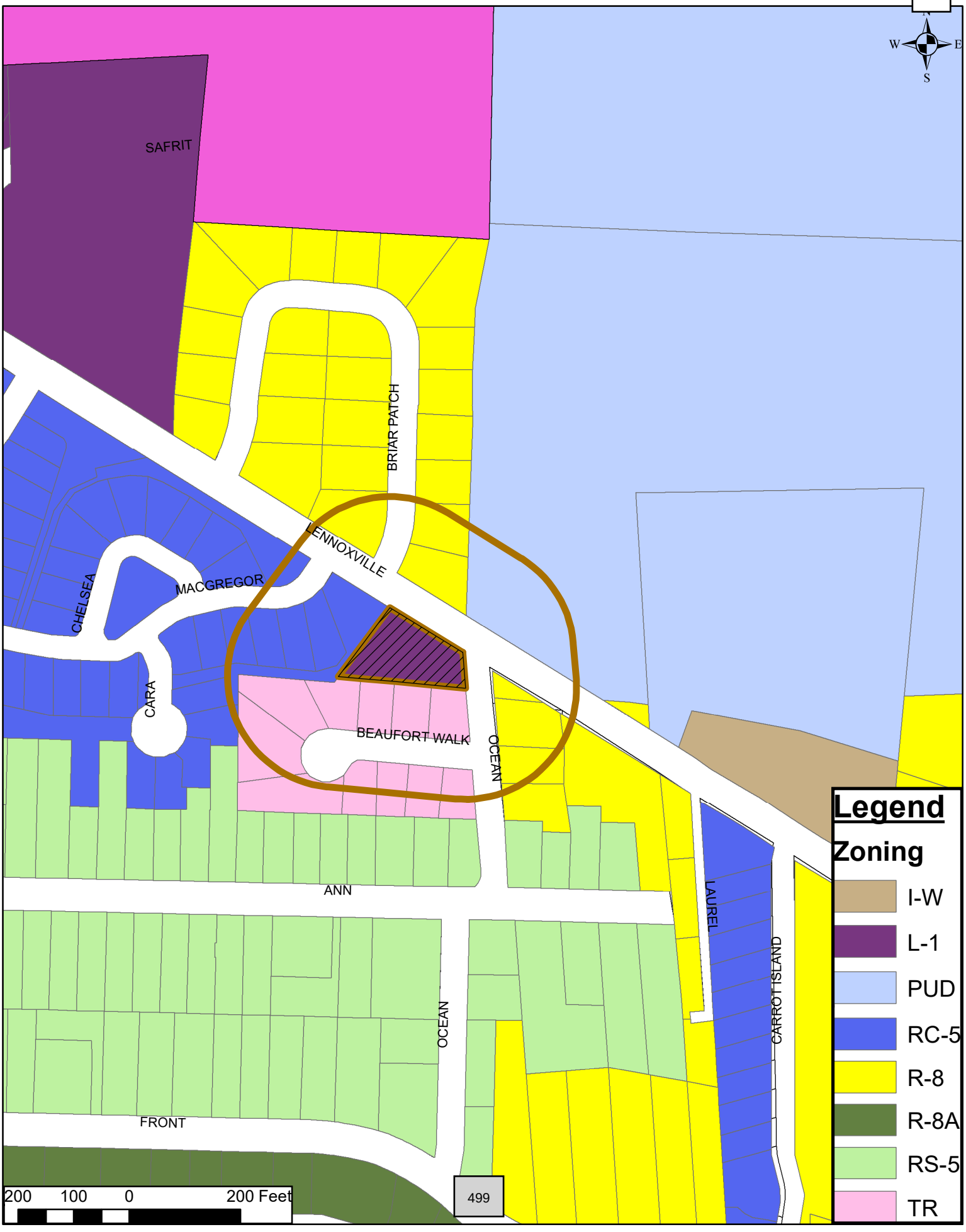
B- Vicinity Map
C - Zoning Map
D - CAMA Land Use Map
E – Application (Revised)
F - Site Plan (Revised)
G - Elevation Drawing
H - List of Property Owners within 200 feet
I - Section 6-F (LDO)
J – Light Industrial Zone Information
K – Section 20 Special Use Permit Information

Case 21-17 Special Use Permit - Vicinity Map With Owners Within 200 Feet

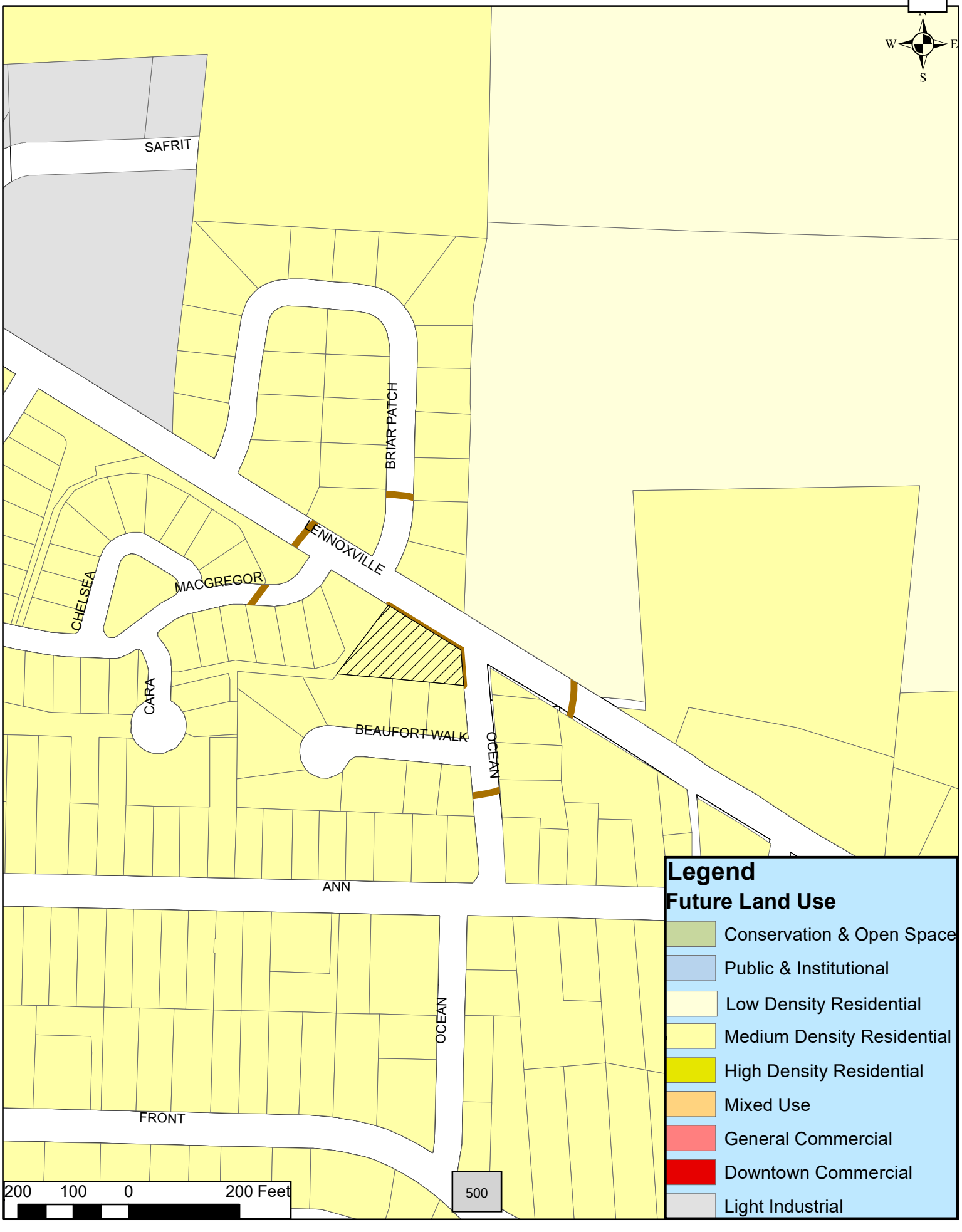


OWNER	MAIL_HOUSE	MAIL_ST	MAIL_CITY	MAIL_STATE	MAIL_ZIP	MAIL_ADD2
ARENDSHORST,WILLIAM ETUX DONNA	4317	KLEIN DRIVE	DURHAM	NC	27705	
AUSTIN,SARA W	1535	ANN STREET	BEAUFORT	NC	28516	
BEAUFORT PROPERTIES LLC			BEAUFORT	NC	28516	PO BOX 25
BLUE TREASURE LLC			CARY	NC	27519	PO BOX 3557
BOBBITT,MARTHA ANN	304	MACGREGOR DRIVE	BEAUFORT	NC	28516	
BRADLEY,CHARLES M ETUX SHEILA	100	BRIAR PATCH DR	BEAUFORT	NC	28516	
CLARK,JAMIE M ETAL MARIE K	107	BEAUFORT WALK	BEAUFORT	NC	28516	
COX,PAUL D ETUX LISA A			BEAUFORT	NC	28516	PO BOX 2276
CUNNINGHAM,BOBBY ETUX LAURIE	5105	WILSHIRE WOODS COURT	FUQUAY VARINA	NC	27526	
DAVIS,RICHARD H ETUX CHERRYL	306	MACGREGOR DRIVE	BEAUFORT	NC	28516	
DOWTY,MARTHA STATON	310	MACGREGOR DRIVE	BEAUFORT	NC	28516	
EDWARDS,JASON D ETUX LARISA M	3995	LANGTREE DR	HARRISBURG	NC	28075	
FEEHAN,SUSAN V ETAL CAR MALONY	104	BEAUFORT WALK	BEAUFORT	NC	2338	28516
FOWLER,ROBERT O ETUX J CHRISTY	133	HOLLY LANE	BEAUFORT	NC	28516	
GOOLISHIAN,GREGORY A JR ETUX	119	CHELSEA CIRCLE	BEAUFORT	NC	28516	
JOHNSON,VON J	1012	RIVERVIEW DRIVE	BOONVILLE	NC	27011	
LEA,CARY SUZANNE	100	DOGWOOD DR	GREENVILLE	NC	27834	
MCCUNE,FREDERICK JOHN	608	ANN STREET	BEAUFORT	NC	28516	
MINIKUS,AMANDA LYNN	164	HESSIAN HILLS WAY	CHARLOTTESVILLE	VA	2516	22901 APT 4
NADEAU,JAMES L ETAL TIMOTHY J	255	MAIN STREET	SACO	ME		04072
OCEAN STREET LLC	625	GLENMERE DRIVE	KNIGHTDALE	NC	6630	27545
POOLE,JOANNE MAZZARELLA	102	BRIAR PATCH DR	BEAUFORT	NC	1740	28516
SATTERLY,LAURA BETH	103	BEAUFORT WALK	BEAUFORT	NC		28516
THE OAKS [illegible] ORT ASSOC INC	306	MACGREGOR DRIVE	BEAUFORT	NC		28516
TOMLINS[illegible]ARY	101	BEAUFORT WALK	BEAUFORT	NC		28516
WILES,PA[illegible]AGONER	308	MCGREGOR DRIVE	BEAUFORT	NC		28516

Case 21-17 Special Use Permit - Zoning Map With Owners Within 200 Feet



Case 21-17 Special Use Permit - CAMA Map With Owners Within 200 Feet



APPLICATION FOR A SPECIAL USE PERMIT

Instructions:

Please complete the form below including all required attachments, a **$400.00 application fee,** and return to the Beaufort Town Hall; 701 Front Street; P.O. Box 390; Beaufort, N.C.; 28516. Incomplete applications will not be processed but will be returned to the applicant. Please call Planning and Inspections at (252) 728-2142 if there are any questions.

APPLICANT INFORMATION

Applicant Name: Jim Dandy Stores

Applicant Address: 812 Arendell Street, Morehead City, NC 28557

Phone Number: (252) 247-6902 Email: jmdavisoil@outlook.com

Property Owner Name: Sara W. Austin

Address of Property Owner: 1550 Lennoxville Road, Beaufort, NC 28516

Phone Number: (252) 838-9028 Email: n/a

PROPERTY INFORMATION

Property Address: 1550 Lennoxville Road, Beaufort, NC 28516

15-Digit PIN: 730507699596000 Lot/Block #: n/a

Size of Property (in square feet or acres): 0.478 Current Zoning: L-I

Current Use of Property: Veterinarian Requested Use: Gas/Service Station

An application fee of **$400.00**, either in cash, money order, or check made payable to the "*Town of Beaufort*" must accompany this application (a credit card payment can be made in person at Town Hall). The complete application, payment, and supporting materials must be received by Town Staff at least 15 working days prior to a regularly scheduled Planning Board meeting date.

Please refer to the Town's ***Land Development Ordinance***, Sections 20 & 27, and all other pertinent sections of the Ordinance for information required to accompany this application. Any plans or documents submitted should be submitted in an electronic or digital format and one printed color copy of such documents submitted with the application.

The town's website address is www.beaufortnc.org.

J. M. Davis III — 7/20/21

Applicant Signature — Date of Applicant's Signature

Sara Austin — 7/20/21

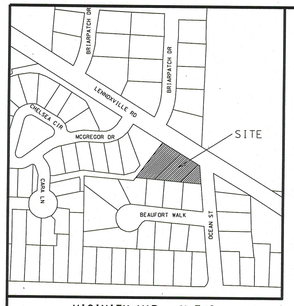
Property Owner Signature (if different than above) — Date of Owner's Signature

OFFICE USE ONLY

Revised 8/2020

Date: _____ Reviewed for Completeness By: _____

Received by: _____ Date Deemed Complete and Accepted: _____



VICINITY MAP N.T.S.

LENNOXVILLE ROAD
SR 1310

NORTH

OCEAN STREET

50.00'

26.25'

ENTRANCE #1

PLANTING

ENTRANCE #2

PASS THRU

162.31

17' 5 5/8"

EXISTING EOP (TYP)

PLANTING

PLANTING

POLE LIGHT

DISPENSER ISLAND

1 PARKING SPACE PER SERVICE BAY (8 BAYS TOTAL)

24' 0"

68.76

54.74'

ENTRANCE #3

DISPENSER ISLAND

14.00'

PARKING 4 CARS

TRACTOR TRAILER FOR DELIVERY

11' 0"

26.83'

OUTLINE OF CANOPY

10' 0"

PARKING 4 GOLF CARTS

ADA

PARKING 3 CARS

9.0'

18.0'

POLE LIGHT

ADA RAMP

BIKE PARKING

ADA RAMP

PARKING 1 CAR

UNDERGROUND PRODUCT TANK

AIR PUMP

DEF TANK

DISPENSER ISLAND

PL

PLANTING

PL

SINGLE DUMPSTER PAD

164.26

C.U.

GENERATOR

SHED ROOF

10' LANDSCAPE BUFFER - TYPE 'A'

243.36

PLANTING

10' TYPE 'A' BUFFER WITH TEN (10) LARGE EVERGREEN TREES, FIFTEEN (15) SMALL EVERGREEN TREES, AND 6' TALL OPAQUE FENCE

10 5 0 10 20

SCALE: 1" = 10'

SITE NOTES

THIS SITE PLAN IS CONCEPTUAL AND SHALL NOT BE USED FOR CONSTRUCTION.

THERE IS NOT A FLOOD ZONE ON THIS PROPERTY.

LOT SIZE: +/-21,518.6 SF
+/-0.493 ACRES

ZONE = L-I LIGHT INDUSTRIAL

NUMBER OF BUILDINGS = 1
MAXIMUM HEIGHT = 40'
EXISTING BUILDING HEIGHT = 16'-0" (PER TIDELAND PLAN)
TOTAL BUILDING AREA = 2,944.56 SF

TYPICAL PARKING SPACE = 9'x 18'
REQUIRED PARKING SPACES = 12
(1 SPACE PER 250 SF OF GROSS FLOOR AREA)

PARKING SPACES PROVIDED=
REGULAR = 15
HANDICAP = 1
TOTAL SPACES = 16

SETBACKS:
FRONT = 20'
REAR = 20'
SIDE = 15'

DEED BOOK/PAGE = 1469/1
PIN = 730507699596000

REFERENCES:
CAD FILE PROVIDED BY TIDELAND CONSTRUCTION.
BOUNDARY INFORMATION OBTAINED FROM CARTERET COUNTY GIS.

THIS PROPERTY FRONTS ALONG LENNOXVILLE ROAD WHICH IS PART OF THE TOWN OF BEAUFORT'S BICYCLE AND PEDESTRIAN MASTER PLAN

LEGEND

	LARGE SHRUB
	SMALL SHRUB
	LARGE DECIDUOUS TREE

NORTH CAROLINA PROFESSIONAL SEAL 37378 ENGINEER CHARLES M. CULLIPHER

7/20/21

REVISIONS:

No.	BY	DATE	DESCRIPTION
1	CMC	7/20/21	PER PLANNING BOARD

SPECIAL USE SITE PLAN

JIM DANDY COMMUNITY STORE

1550 LENNOXVILLE ROAD

BEAUFORT TWSP., CARTERET COUNTY, NORTH CAROLINA

CLIENT: J.M. DAVIS INDUSTRIES, INC

ADDRESS: 812 ARENDELL ST.
MOREHEAD CITY, NC 28557

PHONE: (252)247-6902

DESIGNED:
DRAWN:
CHECKED: CMC
APPROVED: CMC
DATE: 6/14/21
SCALE: 1"=10'

THE CULLIPHER GROUP, P.A.
ENGINEERING & SURVEYING SERVICES
151A HIGHWAY 24
MOREHEAD CITY, N.C. 28557
(252) 773-0090 LICENSE NO. C-4482

CHARLES M. CULLIPHER P.E.

$FILE$



EXISTING FRONT ELEVATION OF AUSTIN VETERINARY
SCALE: 1/4" = 1'-0"

REVISIONS

NO.	DATE	BY
.	.	.
.	.	.

TideLand™ CONSTRUCTION & PETROLEUM

PAUL SUTTON
(P): 252-524-1644
(E): psutton@tidelandco.com

WILL CLARK
(P): 252-814-7979
(E): wclark@tidelandco.com

A NEW PROPOSED SITE PLAN FOR:

JIM DANDY #4

AUSTIN VETERINARY 1550 LENNOXVILLE ROAD BEAUFORT, NORTH CAROLINA

DATE	06.01.2021
SCALE	AS NOTED
DRAWN BY	JBC

B1

OWNER	AIL_HOU	MAIL_ST	MAIL_CITY	L_S	MAIL_ZI	MAIL_ZI	MAIL_ADD2
ARENDSHORST,WILLIAM ETUX DONNA	4317	KLEIN DRIVE	DURHAM	NC		27705	
AUSTIN,SARA W	1535	ANN STREET	BEAUFORT	NC		28516	
BEAUFORT PROPERTIES LLC			BEAUFORT	NC		28516	PO BOX 25
BLUE TREASURE LLC			CARY	NC		27519	PO BOX 3557
BOBBITT,MARTHA ANN	304	MACGREGOR DRIVE	BEAUFORT	NC		28516	
BRADLEY,CHARLES M ETUX SHEILA	100	BRIAR PATCH DR	BEAUFORT	NC		28516	
CLARK,JAMIE M ETAL MARIE K	107	BEAUFORT WALK	BEAUFORT	NC		28516	
COX,PAUL D ETUX LISA A			BEAUFORT	NC		28516	PO BOX 2276
CUNNINGHAM,BOBBY ETUX LAURIE	5105	WILSHIRE WOODS COURT	FUQUAY VARINA	NC		27526	
DAVIS,RICHARD H ETUX CHERRYL	306	MACGREGOR DRIVE	BEAUFORT	NC		28516	
DOWTY,MARTHA STATON	310	MACGREGOR DRIVE	BEAUFORT	NC		28516	
EDWARDS,JASON D ETUX LARISA M	3995	LANGTREE DR	HARRISBURG	NC		28075	
FEEHAN,SUSAN V ETAL CAR MALONY	104	BEAUFORT WALK	BEAUFORT	NC	2338	28516	
FOWLER,ROBERT O ETUX J CHRISTY	133	HOLLY LANE	BEAUFORT	NC		28516	
GOOLISHIAN,GREGORY A JR ETUX	119	CHELSEA CIRCLE	BEAUFORT	NC		28516	
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THE OAKS AT BEAUFORT ASSOC INC	306	MACGREGOR DRIVE	BEAUFORT	NC		28516	
TOMLINSON,RITA MARY	101	BEAUFORT WALK	BEAUFORT	NC		28516	
WILES,PATSY ETAL WAGONER	308	MCGREGOR DRIVE	BEAUFORT	NC		28516	

SECTION 6 Height and Area Exceptions and Supplements

The following requirements or regulations qualify or supplement, as the case may be, the zone regulations or requirements appearing elsewhere in this Ordinance.

A) ***Allowed Projections into Required Yards.***

Certain architectural features, fences, walls, and hedges may project into required yards as follows as long as the corner lot visibility provisions as specified in subsection D of this section shall be observed;

1) Cornices, eaves, and sills – not more than two feet (2') into any required yard;
2) Balconies, bay windows, and chimneys – not more than three feet (3') into any required yard;
3) Planted buffer strips, hedges, fences, or walls, not exceeding four feet (4') in height, shall be exempt from the front yard and front building setback line requirements of this Ordinance;
4) Planted buffer strips, hedges, fences, or walls, not exceeding six feet (6') in height, erected in side and rear yards shall be exempt from the yard and building setback requirements of this Ordinance; and,
5) Open or enclosed fire escapes, outside stairways, balconies, and other necessary unenclosed projections, protruding into a minimum yard not more than thirty-two inches (32") may be permitted where such projections are so placed as not to obstruct the light and ventilation.
6) Paved driveways and walkways at grade as long as all impervious surface limits are met.
7) Trees, shrubs, and vegetation.
8) Every part of a required yard shall be open from its lowest point to the sky unobstructed except as permitted in sections A- 1 through A-7 of this subsection.
9) When adjacent lots of record are under single control by a lease agreement or a combination of ownership and lease agreement, temporary structures such as manufactured homes, manufactured offices, utility buildings, accessory buildings, etc., may extend across any common lot line(s) of the adjacent lots of record under such lease agreement. The location of such structures shall not conflict with any off-street parking requirements, on-site traffic circulation, or other applicable regulatory codes. Upon the expiration of the lease agreement, such structure must be removed to conform to the standard side or rear yard setbacks of the district within sixty days of expiration of the lease agreement.

B) ***Vacant Lot Exceptions.***

If a vacant lot is adjacent to an existing lot containing an existing dwelling on the lot, and such dwelling is situated less than the required front building setback line, the required minimum front building setback line for the vacant lot shall be a line projected along the front wall of the main building to the adjacent lot and across the vacant lot. In cases where existing dwellings are situated on both sides of the vacant lot and each exists less than the

required minimum front building setback line, the required minimum front building setback line for the vacant lot shall not be less than the average of the two front building setbacks of the existing dwellings.

C) ***Board Action.***

In the case of a housing project consisting of a group of two or more buildings to be constructed on a plot of ground of at least two acres and not subdivided into the customary streets and lots, and where the existing or contemplated street and layout makes it impractical to apply the requirements of this Ordinance to the individual buildings in such housing project(s), the application of such requirements for such housing project(s) may be adjusted by the Board of Adjustment (BOA) in a manner which will be in harmony with the characteristics of the neighborhood, will substantially insure the same kind of occupancy, when the density of land use will be no higher than allowed by this Ordinance , and a standard of open space will be at least as high as required by this Ordinance in the district in which such proposed project is to be located. In no case shall the BOA authorize a use, a building height, or a building area prohibited in the district where the housing project is to be located, provided; however, the BOA shall not exercise the authority permitted by this subsection unless or until the Board of Commissioners (BOC) has approved such housing project(s) after receiving a recommendation from the planning board.

D) ***Height Restrictions.***

1) Height restrictions will be determined by the specific zoning district whether inside the Town corporate limits or within the ETJ area.

2) Fixtures and architectural features which are not capable of occupation, such as chimneys, cupolas, domes, elevator shafts, heating and air conditioning equipment, solar collectors, and similar equipment, fixtures and devices and antennae, and which extend no more than ten feet (10') above the highest point on the structure, shall be allowed if the base of such architectural feature or fixture has a square footage which is ten percent (10%) or less than the square footage of the highest habitable floor on the structure.

3) Any nonconforming residential structure in a specific zoning district which exceeds the height limitation for its specific zoning district and is damaged or destroyed by fire, flood, wind, or act of God, may be rebuilt to the dimension of such building or structure as it existed prior to the damage or destruction and according to the North Carolina State Building Codes.

4) Any building or structure in existence on the effective date of this Ordinance may be raised the minimum amount necessary to bring the structure into compliance with the prescriptive minimum flood elevation as determined by the National Flood Insurance program regulations, notwithstanding raising such building or structure will increase its overall height above the building height limitations established herein.

E) ***Exemptions***.

In addition to those fixtures and architectural features allowed to extend above the maximum height limits provide in subsection D-2 of this section, the following are also exempted from the building height limit established in this Ordinance:

1) School gymnasiums,
2) The Carteret County Courthouse,
3) Public utility poles and towers (except towers may be subject to other limits or procedures in this Ordinance),
4) Municipal and public water towers,
5) Permitted communication towers,
6) Bell towers, steeples, and spires on structures used for religious purposes, elevator shafts, chimneys, and similar structural appendages not intended for occupancy or storage;
7) Flagpoles.

F) ***Canopies.***

A canopy in a conforming nonresidential land use which is totally or partially supported by a structural pillar (upright support), such as but not limited to a canopy over gasoline pumps, may extend to the street right-of-way line or property line of a nonresidential use or nonresidential zone, provided such pillar is located at least ten feet (10') from a property line and the canopy is open on all four sides. Any side of a canopy may be enclosed provided the enclosed side meets the required building setback lines established herein.

E) ***L-I Light Industrial District.***

This district is established to provide for the industries and for certain commercial establishments which in their normal operations have little or no adverse effect upon adjoining properties.

1) Minimum Lot Size.
All lots in the L-I district shall be a minimum of eight thousand square feet (8,000 ft^2).

2) Minimum Lot Width.
All lots in the L-I district shall have a minimum lot width of eighty feet (80') at the minimum building line.

3) Building Setback and Building Height Requirements and Limitations.
Subject to the exceptions allowed in this Ordinance, each structure on a lot in this zoning district shall be set back from the boundary lines of the lot at least the distances provided in the tables set forth in this section. The building height limitation in this district is provided in the tables set forth in this section.

Table 9-7 Lot Requirements

District	*Front Setback (Right-of-Way)*	*Rear Setback*	*Side Setback*	*Building Height Limitation*
L-I	20 feet	20 feet	15 feet	40 feet

4) Accessory Building Setback Requirements.
All accessory buildings must comply with the setback requirements as set forth in section 2-F of this Ordinance, section 6 of this Ordinance, section 15 of this Ordinance, and all sections of this Ordinance.

5) Permitted Uses.

Antenna Co-Location on Existing Tower
Aquaculture
Athletic Field, Public
Boat Sale/Rentals
Car Wash
Club, Lodge, or Hall
Community Garden
Concealed (Stealth) Antennae & Towers
Dock
Dry Boat Storage
Farming, General
General Industrial Service
Government/Non-Profit Owned/ Operated Facilities & Services
Heavy Equipment Sale/Rentals
Heavy Vehicle Repair
Kennel, Indoor Operation Only
Kennel, Indoor/Outdoor Operation
Manufacturing, Light
Mini-Storage
Motor Vehicle Sale/Rentals
Neighborhood Recreation Center, Public
Office: Business, Professional, or Medical
Other Building Mounted Antennae & Towers
Outdoor Retail Display/Sales
Outdoor Storage
Park, Public
Parking Lot
Parking Structure
Personal Service Establishment
Public Safety Station

Public Utility Facility
Religious Institution
Resource Conservation Area
Satellite Dish Antenna
Signs, Commercial Free-Standing
Temporary Construction Trailer
Towing & Vehicle Service
Transportation Facility
Utility Minor
Vehicle Charging Station
Vehicle Service
Warehousing and Distribution Establishment
Wholesale Establishment

6) Special Use (*Special Uses* text may be found in section 20 of this Ordinance).

Adult Entertainment
Adult-Oriented Retail Establishment
Commercial Indoor Recreation Facility
Commercial Outdoor Amphitheater
Commercial Waterfront Facility
Commercial, Outdoor Recreation Facility
Gas/Service Station
Golf Driving Range
Marina
Microbrewery
Microdistillery
Mixed Use
Other Freestanding Towers
School, Post-Secondary
Tavern/Bar/Pub with Indoor Operation
Tavern/Bar/Pub with Outdoor Operation
Theater, Large
Theater, Small
Utility Facility

SECTION 20 Special Use Permits

A) ***General.***
Special uses are practices which are not permitted by right in any zoning district in the Town of Beaufort, but may only be granted after due consideration by the Board of Commissioners (BOC). The consideration of a special use application is a quasi-judicial function requiring evidentiary hearings and specific findings of fact. Special use permits may only be granted by the BOC following a recommendation by the planning board and the quasi-judicial review process as stipulated in this section.

B) ***Special Use Permit Application Procedures.***

1) A written application for a special use permit in all zones shall be submitted to the Town's Planning and Inspections Department in accordance with the requirements of section 1-M of this Ordinance and all applicable administrative regulations. The application shall include:
   a) A proposed use site plan which contains information documented in section 18-C of this Ordinance and the specific information features below:
      i) A vicinity map and survey of the parcel which shall include the zoning and use of all adjacent properties;
      ii) A legend identifying all symbols on the map;
      iii) A North arrow and a scale;
      iv) A preliminary design of the proposed use which shows all existing and proposed structures, parking layouts, driveways, buffering, landscaping, points of ingress and egress, easements, minimum building lines, and street rights-of-way;
      v) A site data block of features which includes the proposed use(s), square footage of the proposed and existing structure(s), site zoning, total acreage, number of lots, minimum lot size, and average lot size;
      vi) The map book, page number, and deed book information;
      vii) A note stating whether any portion of the property is included in any adopted Town plan; and,
      viii) Any other related information requested by Town staff, the planning board, or the BOC.
      ix) All required environmental permit improvements needed for the property.
   b) The special use permit sought; and,
   c) Information supporting the existence of the required findings, and providing such plans or other relevant data as may be required by the Town.

2) Whenever an application is submitted for a special use permit in a residential zone, the applicant shall also include:
   a) A narrative which illustrates the appropriateness of the proposed use in a residential zone. This narrative shall also describe all the architectural design features which make the proposed use and associated building compatible with the urban character of the residential neighborhood;
   b) The submitted site plan shall also include all street front architectural elevation drawings to insure the building(s) compatibility with the surrounding residential structures; and,

c) Additionally, the BOC and town staff may require a professional rendering or any other graphic illustration of the proposed structure.

3) The application shall be reviewed by town staff and submitted with comments and recommendation to the planning board for review. After the planning board makes its recommendation, the application shall be forwarded to the BOC for consideration.

C) ***Quasi-Judicial Proceeding Notification Requirements.***

The Town shall schedule a quasi-judicial proceeding for the application and BOC consideration after reasonable opportunity for staff and planning board review by providing public notice no more than thirty days after receipt of the completed application. The notice of a quasi-judicial proceeding shall be given using the standards set forth is section 3-E of this Ordinance with the exception of the following:

1) The notice shall be given once a week for two successive calendar weeks and published in a newspaper having general circulation within Town. The first publishing shall not be less than ten days or not more than twenty-five days before the date affixed for the hearing. In computing such period, the day of publication is not to be included but the day of the hearing shall be included as documented.

2) All property owners within two hundred feet (200') of the lot boundaries on all sides of the subject lot as listed in the county tax records shall be mailed by the Town a notice of the quasi-judicial proceeding on the proposed special use application by first class mail at the address listed for such owners on the county tax abstracts. The notice shall identify the location and briefly describe the proposed special use. Section 3-E (2) of this Ordinance gives direction on when the notices shall be mailed.

3) The Town shall prominently post a sign giving notice of the quasi-judicial proceeding on or immediately adjacent to the subject area reasonably calculated to give public notice of the proposed special use public hearing not more than ten days prior to the hearing date. The wording of such sign should be similar to what is in section 3-E (4) of this Ordinance.

D) ***Procedures on Special Use Applications.***

In considering whether to approve an application for a special use permit, the BOC shall proceed as follows:

1) The BOC shall hold the quasi-judicial proceeding and consider relevant information regarding whether the required findings under subsection E of this section exist and whether the special use is appropriate in the proposed location. The BOC shall hear relevant information from the applicant, adjoining property owners, the Town Manager, the planning board, planning officials, and any interested or affected members of the public. Parties may appear in person, by designee, or by attorney to present information relevant to the requirements of the Ordinance.

2) The BOC shall consider whether the application complies with each individual required finding specified in subsection E of this section. The BOC need not make the required findings at the time of the hearing and may call for additional information if needed. If the special use permit application is approved, the BOC motion shall contain language showing all the required findings under subsection E of this section have been met, and in the absence of specific findings, it shall be conclusively presumed the application complies with all the findings in subsection E of this section.

3) The BOC shall render a decision within a reasonable period of time not to exceed ninety days after holding the quasi-judicial proceeding for the proposed special use application.

The BOC need not issue a decision at the time of the hearing if additional information is needed and may continue said hearing until a later date.

4) If the application is found not to be in compliance with one or more of the required findings of subsection E of this section or any other applicable section of this Ordinance, the application shall be denied. Such motion shall specify the particular findings the application fails to meet. It shall be conclusively presumed the application complies with all requirements not noted by the BOC in their motion to deny the application.
5) Notwithstanding the specific requirements of this Ordinance, the BOC may impose additional conditions and reasonable requirements upon the requested special use permit in order to ensure the use is consistent with the required findings as specified under subsection E of this section. The BOC may place an expiration date on the special use permit if a building permit is not secured within a certain period of time. If the special use permit is not renewed periodically by the recipient of the permit, it will expire on the date given to the permit by the BOC.
6) After the BOC renders its decision on the special use permit application, the reasons for granting or denying the application shall be made in writing. A written copy of the conclusion(s) of the BOC about the facts of the case and the board's corresponding decision shall be forwarded to the applicant within ten days.

E) ***Required Findings.***

1) In addition to any other findings or requirements as specified by any other section of this Ordinance, before any application for a special use may be granted or denied, the BOC shall make each of the following findings:
   a) The proposed use is an allowable special use in the zoning district it is being located within;
   b) The application is complete;
   c) The location and character of the use will be in conformity with the Town's land use plan and other comprehensive planning elements;
   d) Streets, driveways, parking lots, traffic control, and any other traffic circulation features shall be designed and provided in accordance with current traffic engineering standards and Town regulations and found to be adequate for the proposed special use;
   e) The proposed special use will not substantially injure the value of adjoining or abutting properties;
   f) The proposed special use will be compatible and in harmony with adjoining land uses and the development patterns of the immediate area; and,
   g) The proposed use will not materially endanger the public health or safety of the community if located where proposed and developed according to the submitted and approved plan.
2) The BOC shall make its findings based on "competent evidence" as described in N.C.G.S. 160A-393 (k) and will be cognizant the statute provides in part "competent evidence "shall not be deemed to include the opinion testimony of lay witnesses as to any of the following:
   a) The use of property in a particular way would affect the value of other property.
   b) The increase in vehicular traffic resulting from a proposed development would pose a danger to the public safety.

c) Matters about which only expert testimony would generally be admissible under the rules of evidence.

3) Compatibility Standards for Special Uses in Residential Zones:
In deciding whether the architectural elements of the proposed special use in a residential zone will be compatible with the adjoining buildings, the BOC shall review said proposal in reference to the following architectural elements:

a) Size (footprint);
b) Height;
c) Proportion and scale;
d) Roof shape(s);
e) Setbacks;
f) Location, size, and number of openings (doors and windows);
g) Materials;
h) Color; and,
i) Texture.

F) ***Special Use Guidelines.***

1) Adult Establishments.

a) No building, structure, or any portion thereof nor any portion of a lot or parcel or property shall be used for an adult establishment at a location closer than one thousand feet (1000') from any other adult establishment; or closer than one thousand feet (1000') from any residentially zoned property, pre-school, child care, nursery school, day care, K-12 school, public playground, or church situated within the Town limits or the ETJ.

b) Plans are required and must show:
   i) Locations of buildings and signs and the size of the plan;
   ii) Proposed points of access and egress and patterns of circulation;
   iii) Layout of parking spaces;
   iv) Lighting plan inclusive of wattage and illumination; and,
   v) Landscape plan.

2) Day Care Centers (Including Kindergarten).

a) One parking space shall be provided for each adult attendant and one parking space provided for every six children or fraction thereof.

b) Section 19 of this Ordinance gives the screening/buffering and fencing guidelines required for this application.

c) Plans are required and must show:
   i) Location and approximate size of all existing and proposed structures and buildings within the site and on the lots adjacent thereto;
   ii) Proposed points of access and egress and pattern of circulation;
   iii) Layout of parking spaces;
   iv) Location and extent of open play area(s);
   v) Day care center shall provide one hundred square feet (100 ft^2) of play area space per pupil.

vi) Outdoor play area shall be enclosed by a solid or open fence or wall at least four feet (4') in height. Where the outdoor play area is directly adjacent to a residentially used or zoned lot, a solid fence or wall at least six feet (6') high or the maximum applicable fence or wall height limitation for the district or an open fence at least four feet high (4') and a screen planting designed to grow three feet (3') thick and six feet (6') high shall be created. The BOC may at its discretion, require additional screening/buffering and/or fencing elements to be located adjacent to abutting nonresidential land uses.

vii) In residential districts, a day care center shall not be operated between the hours of 7:00 p.m. and 7:00 a.m. unless with written approval by the BOC.

viii) Landscape plan.

3) Radio or Television Transmitter.
   a) Minimum lot area – at least three acres in area.
   b) One parking space is required at the site.
   c) Plans are required and must show:
      i) Location and approximate size of all existing and proposed structures within the site and within one thousand linear feet in all directions;
      ii) Proposed points of access and egress;
      iii) Proposed off-street parking spaces; and,
      iv) Protective fencing at least six feet (6') high with three stands of barbed wire turned out and ten feet (10') from the perimeter of the antenna base shall be established.

4) Telecommunication Tower.
   a) Guy-wire towers shall not be permitted.
   b) Co-location towers shall be permitted.
   c) Height of communication towers shall be regulated by the Federal Aviation Administration (FAA).
   d) Communication towers are prohibited in front yards and shall be in compliance with the Telecommunication Act of 1996.
   e) Local governments have no ability to prohibit towers on the basis of environmental or health issues according to the Federal Radio Frequency Emission Standards.
   f) The BOC may deny a permit based upon a tower's influence on property value or aesthetics.
   g) A minimum lot size of one-half acre per tower shall be met; however, the Telecommunication Tower shall be placed on a lot of sufficient size, and in a position on the lot, if the tower falls, no part of it will fall onto adjacent property. Variances shall not be allowed.
   h) Landscaping and screening/buffering are required as approved by the planning board and according to section 15 and section 19 of this Ordinance.
   i) A six-foot (6') high protective barrier shall be required around the base of the tower. The barrier shall be a masonry wall, chain link fence, solid wood fence, or opaque barrier as described in section 19 of this Ordinance.
   j) Setback requirements shall be according to the district in which the tower is located.
   k) Towers shall be lighted to satisfy the FAA requirements.

l) Towers shall be removed within ninety days following abandonment of such towers.

m) Towers shall be removed by the property owner within one hundred eighty days following damage or termination of operation resulting in inoperable towers or towers where the owner of the tower shows no intent to repair said tower. Blown over towers shall also be removed by the owner of such tower under this guideline.

n) Any advertising signage is strictly prohibited on towers.

o) Towers shall be painted blue or gray if not otherwise required by the FAA.

p) The owner must provide adequate insurance coverage for any potential damage caused by or caused to the tower.

q) For permitting purposes, site plans are required as defined in section 18 of this Ordinance and shall show all of the following additional features:
   i) Identification of intended user of tower.
   ii) Documentation by registered engineer shows tower has sufficient structural integrity to accommodate more than one user.
   iii) Statement from owner indicating his intent to allow shared use of the tower and how others will be accommodated.
   iv) Evidence the property owners of residentially zoned/used property within three hundred feet of the base of the proposed tower, would be notified prior to the special use application being heard by the BOC.
   v) Documentation which shows towers over a certain height are absolutely necessary for the provision of service (i.e., a tower up to one hundred ninety-six feet (196') cannot provide a reasonable level of service).

r) The BOC shall determine if a tower is in harmony with the area and compatible with adjacent properties and may consider the aesthetic effects of the tower as well as mitigating factors concerning aesthetics. The BOC may disapprove a tower based on the grounds the aesthetic effects are unacceptable and a new site should be proposed. The following factors shall be considered:
   i) Protection of the view in scenic areas, unique natural features, scenic roadways, historic sites, etc.
   ii) Prevention of a concentration of towers in one certain area; and,
   iii) Height, design, placement, and other characteristics could be modified to have a less intrusive visual impact.

5) Marinas.

The requirements below are for marinas and for proper disposal of sewage from boats:

a) All slips over thirty feet (30') shall provide a permanent pump-out connection so a hose of not more than thirty feet (30') can reach the mid-point of the slip.

b) Any vessel with a permanently installed marine sanitation devise shall be located so the holding tank can be pumped-out using a hose not to exceed thirty feet (30').

c) Mobile pump-out equipment may not be used to meet the requirements of subsections 5a) and 5b) of this section.

d) A marina may not charge marina tenants an additional fee to pump-out their holding tanks.

e) When a T-head of a dock is unoccupied during regular business hours, the marina shall provide public access to the pump-out facility for a nominal fee.

6) Office: Small Business.

Property owners may be granted a special use permit for an Office: Small Business in a Residential Zoning District if identified as a *Small Business* as defined in section 4 of this Ordinance.

a) In addition to application requirements outlined in subsection B of this section, special use permit applications must include the following:
   i) Detailed narrative describing the activities associated with the requested use;
   ii) Number of employees requested to work on site;
   iii) Requested business hours of operation;
   iv) Estimated number of clients served on site per day; and,
   v) Detailed drawing or photographs, including measurements, of signage if requested.

b) Signage will be reviewed by the BOC at the time of the special use permit and will meet the following standards:
   i) Not more than one sign is permitted;
   ii) Sign will not exceed an area of two square feet (2 ft^2);
   iii) Colors will be compatible with those of the structure and will not detract from the residential characteristics of the structure;
   iv) Sign will be affixed flatly against the building; and,
   v) Directly lighted and/or neon signage is not permitted.

c) Conditions: The BOC may impose reasonable conditions as it deems necessary for the protection of the public health, general welfare, and public interest regarding:
   i) Compatibility. The compatibility of the proposal, regarding both use and appearance, with the surrounding neighborhood;
   ii) Hours of Operation. The frequency and duration of indoor/outdoor activities and the impact of the surrounding area;
   iii) Noise. The added noise level created by activities associated with the request;
   iv) Parking. The request will not generate a need for additional parking; and,
   v) Appearance. The general appearance will not be adversely affected by the location of the proposed use on the property.