



Town of Pilot Mountain
Town Hall 124 West Main Street Pilot Mountain, NC 27041
Monday, February 10, 2020, 7:00 PM

BOARD OF COMMISSIONERS REGULAR MEETING AGENDA

Call to Order/Moment of Silence/Pledge of Allegiance

Adoption of Agenda

Public Comment

Anyone may speak on any issue. Before speaking, please state your name and address. Please limit comments to three minutes.

Consent Agenda

- [1.](#) Approval of Minutes
- [2.](#) Change to the Meeting Schedule

Board & Committee Reports

- [3.](#) ABC Board Report

Unfinished Business

- [4.](#) Streetscape Capital Project Budget Amendment
- [5.](#) Streambank Restoration Project Easements

New Business

- [6.](#) FY 2020 Budget Amendment 4

Administrative Reports

- [7.](#) Manager and Staff Reports

Mayor and Commissioners Comments

Other Business

Adjourn

**Town of Pilot Mountain
Board of Commissioners Meeting
Tuesday, January 21, 2020
Special Meeting 6:00 PM**

Members Present: Commissioner Kim Quinn, Commissioner Donna Kiger, Commissioner Hilda Willis and Commissioner Scott Needham.

Staff Present: Town Manager, Michael Boaz and Main Street Coordinator, Jenny Kindy

Call to order– 6:00 PM

Mayor Pro Tem Kim Quinn called the meeting to order in the absence of the Mayor.

Presentation of Mobile Town Guide App

The Board heard a presentation from Remington Rakaou with Mobile Town Guide about their app that the Town could purchase.

Adjourn or Recess

Commissioner Needham made a motion to adjourn and it was unanimous.

Respectfully Submitted:

Attest:

Holly Utt
Town Clerk

Evan Cockerham
Mayor

**Town of Pilot Mountain
Board of Commissioners Meeting
Monday, January 13, 2020
Regular Meeting 7:00 PM**

Members Present: Mayor Evan Cockerham, Commissioner Kim Quinn, Commissioner Donna Kiger, Commissioner Hilda Willis and Commissioner Scott Needham.

Staff Present: Town Manager, Michael Boaz and Town Clerk, Holly Utt

Call to order/Moment of Silence/Pledge of Allegiance – 7:00 PM

Mayor Cockerham called the meeting to order at 7:00 PM. All in attendance observed a moment of silence. Charlie Speagle led the public in reciting the pledge of allegiance.

Adoption of Agenda

Commissioner Needham made a motion adopt the agenda as presented and it was unanimous.

Resolution Honoring State Champion East Surry High School Cardinals

Commissioner Needham made a motion to approve Resolution No. 2019/20-05 and it was unanimous. Mayor Cockerham presented the Resolution to the East Surry High School Cardinal football players that were present. Michelle Fallin, President of the Pilot Mountain Civic Club, presented the Cardinal Foundation with a donation in honor of the ESHS Cardinal Football team in honor of their hard work and winning the state championship.

Public Comment

Anna Nichols was present to address the Board. She thanked them for the upkeep and care of the library property. She announced upcoming events to be held at the Charles H. Stone Memorial Library. There will be an advocacy meeting and soup supper on January 16th at 6:00 PM. Tax assistance is available by VITA at other library branches. A Matter of Balance, a free program that improves balance and flexibility, will be available from March 16th – May 11th at the Library.

Consent Agenda

- December 3, 2019 Regular Meeting Minutes

Commissioner Quinn made a motion to add the appointment of Sebrina Mabe to the Library Board to the consent agenda and it was unanimous.

Commissioner Kiger made a motion to approve and adopt the consent agenda and the items there upon and it was unanimous.

ABC Board Report

Elton Crutchfield reported that the ABC store had sales in December of \$164,853, compared to sales in December 2018 of \$159,632.

Surry County Tourism Partnership

Jessica Roberts with the Surry County Tourism Partnership presented advertising material that had been used to promote tourism in Surry County and Pilot Mountain. She noted that tourism had grown in the county by 43% over the last eight years in tourism expenditures.

Unfinished Business

Main Street Maintenance

Mr. Boaz explained that the NC DOT does not like the storm water solution that was proposed by Withers Ravenel. In order to move forward with the streetscape design the town would have to assume maintenance some portion of Main Street. The catch basins are in good shape and they do not need any maintenance. There are some lids that need replacing but the DOT will replace those when they do the resurfacing project. The current plan is to pave the portion of Main Street from Academy to 52 bypass in the summer, the portion of Main Street from Key Street to 52 bypass in 2021. The DOT has agreed to set aside funding that can be used for the paving on Main Street from Key to Academy once construction is completed. Commissioner Willis made a motion to approve Resolution No. 2019/20-06 and it was unanimous.

Main Street Power Lines

Mr. Boaz explained that there were two options for the power lines on Main Street. The first option is to leave the transmission mains and put them on decorative metal poles. The second option is to move the power lines completely off of Main Street onto Pine Street. The second option is approximately \$500K more than the first option. The upfront cost for engineering will be approximately \$17K. Commissioner Kiger asked if the Board would need to decide on which option before authorization. Mr. Boaz stated that it could delay the process but once the engineering project starts then that money is gone. Commissioner Needham made a motion to authorize the town manager to approve the power line design project and it was unanimous.

New Business

Landfill Rehabilitation Capital Project Ordinance Amendment

Mr. Boaz stated that the town had received grant funding to investigate and rehab the old town landfill site. The final report from the investigation has been completed. The DEQ will review the report and add it to the list for remediation at their expense. Commissioner Willis made a motion to adopt Capital Project Ordinance Amendment 4 and it was unanimous.

FY 2019-2020 Budget Amendment 3

Mr. Boaz explained that this budget amendment would appropriate fund balance to purchase the easements for the Stream Bank Restoration Project and finance the Duke Energy power line move design phase. Commissioner Needham made a motion to approve FY 2019-2020 Budget Amendment 3 and it was unanimous.

Administrative Reports

Town Manager's Report

- Copies of the audit report for FY 2018-2019 have been issued, it has been submitted for consideration by the GFOA for the annual award
- A local solar company met with staff about potential savings for the town by placing solar panels at the WTP to offset power purchased from the grid. He noted that the report looked promising and he has invited them to speak with the Board at the March work session.

- The Economic Development Partnership after hours social will be held on January 29th from 5-7PM at Hilda's Place.
- The next work session will be on January 21st at 6:00PM from 6-8 at the Pilot Center
- He asked the Board to think about dates for a budget session

Mayor and Commissioners Comments

Mayor Cockerham: There are a lot of infrastructure projects and Main Street project that are very exciting. With so many great plans he is really looking forward to getting shovels in the dirt this year.

Commissioner Quinn: No comments

Commissioner Needham: Congratulated the East Surry Cardinals football team.

Commissioner Kiger: No comments

Commissioner Willis: Announced that the Rising Talents Scholarships are now online for any student ages 13 - 25 in Surry or Stokes County. The first award will be given in March. The NC Touring Theatre is willing to partnership with Pilot Mountain. The first piece will be done in February.

Closed Session

Commissioner Kiger made a motion to enter into closed session and it was unanimous.

Commissioner Needham made a motion to come out of closed session and it was unanimous.

Mr. Boaz announced that Robbie Jackson had been appointed as the new Police Chief effective immediately. He will be sworn in at a later date.

Other Business

Mr. Boaz announced that the town had been accepted in the NC Downtown program.

Adjourn or Recess

Commissioner Needham made a motion to adjourn and it was unanimous.

Respectfully Submitted:

Attest:

Holly Utt
Town Clerk

Evan Cockerham
Mayor



TOWN OF PILOT MOUNTAIN
BOARD OF COMMISSIONERS MEETING

Approval of Minutes	
<u>Background Information:</u>	
These are the minutes from the January 13 Regular Board meeting and the January 21 workshop.	
<u>Staff Recommendation:</u>	Staff recommends that the Board approve the meetings.
<u>Possible Board of Commissioner Actions</u>	
• Approve the Minutes • Make changes to the minutes and approve. • Deny approval of minutes • Take no action	
<u>Attachments</u>	
• January 13, 2020 Meeting Minutes • January 21, 2020 Meeting Minutes	



TOWN OF PILOT MOUNTAIN
BOARD OF COMMISSIONERS MEETING

Change to the Meeting Schedule	
<u>Background Information:</u>	
The NC Main Street Conference begins on Tuesday March 10 and several of us will leaving for that conference on Monday. I am asking that the Board of Commissioners move the meeting from Monday, March 9 to Monday March 16.	
<u>Staff Recommendation:</u>	Staff recommends that the Board approve the schedule change.
<u>Possible Board of Commissioner Actions</u>	
• Approve Schedule Change • Deny approval of Schedule Change • Take no action	
<u>Attachments</u>	
• None	



TOWN OF PILOT MOUNTAIN
BOARD OF COMMISSIONERS MEETING

ABC Board Report	
<u>Background Information:</u>	
ABC Board Chairman Billy Pell will give the monthly ABC report.	
<u>Staff Recommendation:</u>	Information only
<u>Possible Board of Commissioner Actions</u>	
• Take no action	
<u>Attachments</u>	
• None	



TOWN OF PILOT MOUNTAIN
BOARD OF COMMISSIONERS MEETING

Streetscape Capital Project Budget Amendment	
<u>Background Information:</u>	
This budget amendment will allow the movement of the money appropriated at last month's meeting to pay for the Duke Energy design fees from the general fund to the streetscap capital project fund.	
<u>Staff Recommendation:</u>	Staff recommends that the Board approve the budget amendment
<u>Possible Board of Commissioner Actions</u>	
• Approve Budget Amendment • Deny approval of Budget Amendment • Table to a later meeting • Take no action	
<u>Attachments</u>	
• Streetscape Capital Project Budget Amendment	

Town of Pilot Mountain, North Carolina

Streetscape Capital Project Ordinance

Amendment No. 1

BE IT ORDAINED by the Pilot Mountain Board of Commissioners that the Landfill Rehabilitation Capital Project Ordinance be amended as follows:

Revenues	-
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Increase	38-3999-1000 – DEQ-Division of Waste Management	\$17,850.00
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Total Increase	\$17,850.00
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EXPENDITURES	-
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Increase	38-4210-1900 – Professional Services	\$17,850.00
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Total Increase	\$17,850.00
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Adopted this 10th day of February, 2020

Evan J Cockerham, Mayor

Holly Utt, Town Clerk

Explanation of Amendment:

1. To account for additional expenditures and grant revenue for streetscape project.



TOWN OF PILOT MOUNTAIN
BOARD OF COMMISSIONERS MEETING

Streambank Restoration Project Easements	
<u>Background Information:</u>	
We had an error in the survey on one property that we filed an eminent domain complaint on. This means that we need to file an amended complaint on this property. This error also affected the New River Tire easements and so we also need to revise the resolution authorizing the filing of a complaint on these two parcels as well. This complaint has not been filed because we are close to working out an agreement with the property owner.	
<u>Staff Recommendation:</u>	Staff recommends that the Board approve the resolutions.
<u>Possible Board of Commissioner Actions</u>	
• Approve resolutions • Deny approval of resolutions • Table to a later meeting • Take no action	
<u>Attachments</u>	
• Marinaran Resolution • New River Tire Resolution	



TOWN OF PILOT MOUNTAIN, NC

124 WEST MAIN STREET, PILOT MOUNTAIN, NC 27041

RESOLUTION AUTHORIZING CONDEMNATION TO ACQUIRE CERTAIN PROPERTY OF Kelly Hobbs Marinar

WHEREAS, the governing body of the Town of Pilot Mountain hereby determines that it is necessary and in the public interest to acquire a conservation easement for a portion of certain property owned by Kelly Hobbs Marinar for the following purpose:

- for riparian buffers for the purposes of providing environmental protection for surface waters and urban drinking water supplies; and
- for the purpose of protecting and conserving surface waters and enhancing drinking water supplies, including the development of water supply reservoirs; and
- to preserve the ecological diversity of North Carolina, including natural features such as riverine, montane, coastal and geologic systems and other natural areas to ensure their preservation and conservation for scientific, educational, cultural and aesthetic purposes.
- to preserve, enhance, restore and maintain the natural features and resources for the property interest subject to eminent domain, to provide habitat for native plants and animals, to control runoff of sediment and to improve and maintain water quality, including providing environmental protection for surface waters of portions of the unnamed tributary to Chinquapin Creek and its tributaries.

WHEREAS, the proper officials or representatives of the Town of Pilot Mountain have been unable to acquire the needed interest in this property by a negotiated conveyance,

NOW, THEREFORE, be it resolved by the governing body of the Town of Pilot Mountain that:

1. Town of Pilot Mountain shall acquire by condemnation for the purposes stated above, the property and interest described as follows: Conservation Easement 35 feet on either side of the center line of an unnamed tributary to Chinquapin Creek on property deemed by the State to qualify as a riparian buffer, addressing the protection, including but not limited to, clean-up and prevention of pollution of the State surface waters and the establishment of a network of riparian buffer greenways. A more complete description is attached and incorporated herein by reference on Exhibit "A" and an illustration of the conservation easement area is on Exhibit "A-1"
2. The attorneys representing the Town of Pilot Mountain are directed to institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes to acquire the property herein described.
3. Complaints and ancillary paperwork in connection with the eminent domain actions can be signed by the Town Manager.

In witness whereof, I have hereunto set my hand and hereunto affixed the corporate seal of said Town, this the 10th day of February 2020.

Holly Utt, Town Clerk

EXHIBIT "A"

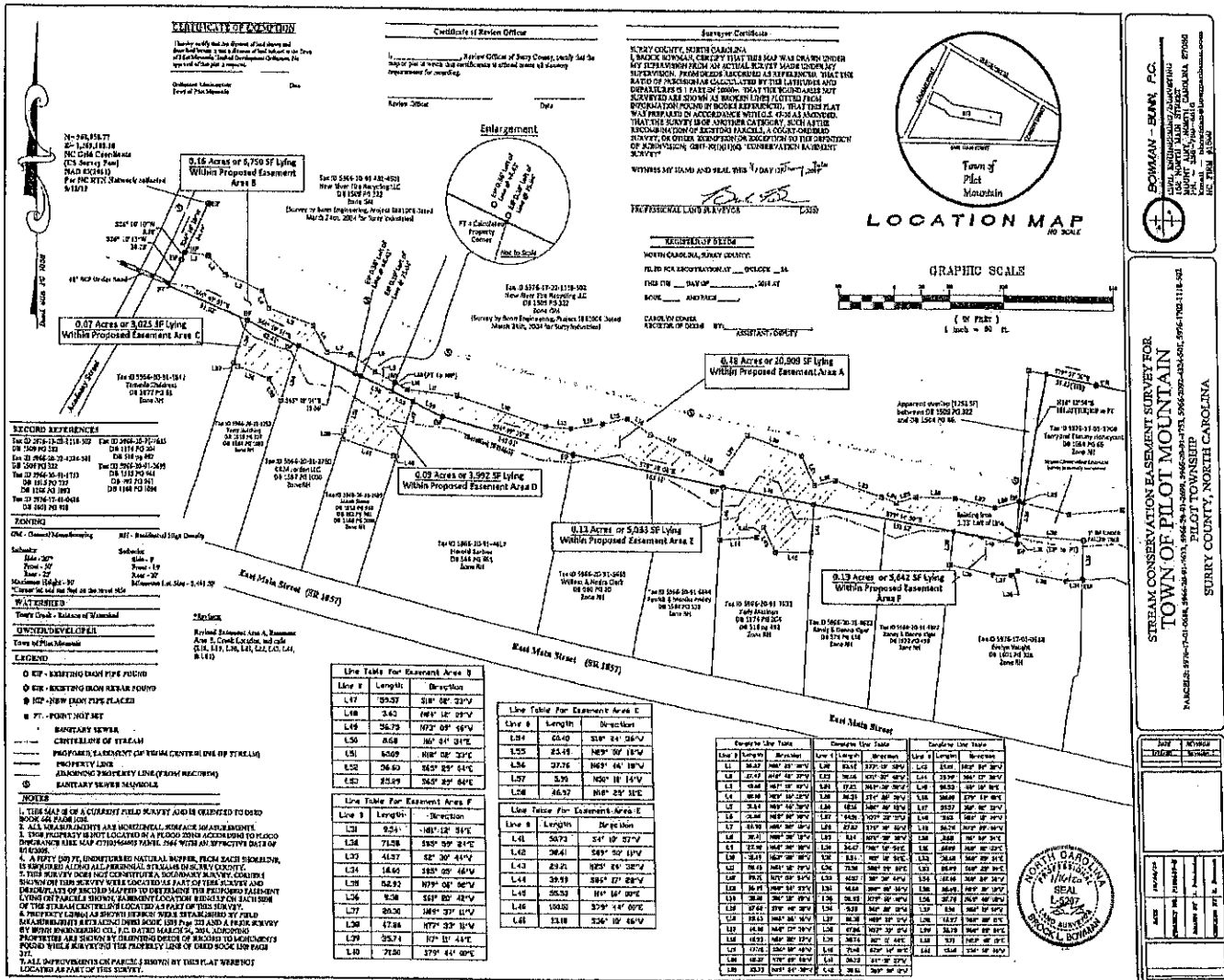
Description of the Area Taken.

Being that 0.12 acre (+/-), portion or 5,033 SF Lying Within Proposed Easement Area E, of the real property described above as shown hash marked on plat of survey entitled Stream Conservation Easement Survey dated 10/14/19 by Bowman-Bunn, PC, NC RLS L-5207.

[Copy of said plat attached hereto and incorporated herein by reference.]

A Portion of Surry County Tax Parcel No. 5966-20-91-7633

Exhibit "A-1"





TOWN OF PILOT MOUNTAIN, NC

124 WEST MAIN STREET, PILOT MOUNTAIN, NC 27041

RESOLUTION AUTHORIZING CONDEMNATION TO ACQUIRE CERTAIN PROPERTY OF New River Tire

WHEREAS, the governing body of the Town of Pilot Mountain hereby determines that it is necessary and in the public interest to acquire a conservation easement for a portion of certain property owned by New River Tire for the following purpose:

- for riparian buffers for the purposes of providing environmental protection for surface waters and urban drinking water supplies; and
- for the purpose of protecting and conserving surface waters and enhancing drinking water supplies, including the development of water supply reservoirs; and
- to preserve the ecological diversity of North Carolina, including natural features such as riverine, montane, coastal and geologic systems and other natural areas to ensure their preservation and conservation for scientific, educational, cultural and aesthetic purposes.
- to preserve, enhance, restore and maintain the natural features and resources for the property interest subject to eminent domain, to provide habitat for native plants and animals, to control runoff of sediment and to improve and maintain water quality, including providing environmental protection for surface waters of portions of the unnamed tributary to Chinquapin Creek and its tributaries.

WHEREAS, the proper officials or representatives of the Town of Pilot Mountain have been unable to acquire the needed interest in this property by a negotiated conveyance,

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2. The attorneys representing the Town of Pilot Mountain are directed to institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes to acquire the property herein described.
3. Complaints and ancillary paperwork in connection with the eminent domain actions can be signed by the Town Manager.

In witness whereof, I have hereunto set my hand and hereunto affixed the corporate seal of said Town, this the 10th day of February 2020.

Holly Utt, Town Clerk



TOWN OF PILOT MOUNTAIN, NC

124 WEST MAIN STREET, PILOT MOUNTAIN, NC 27041

RESOLUTION AUTHORIZING CONDEMNATION TO ACQUIRE CERTAIN PROPERTY OF New River Tire

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- for the purpose of protecting and conserving surface waters and enhancing drinking water supplies, including the development of water supply reservoirs; and
- to preserve the ecological diversity of North Carolina, including natural features such as riverine, montane, coastal and geologic systems and other natural areas to ensure their preservation and conservation for scientific, educational, cultural and aesthetic purposes.
- to preserve, enhance, restore and maintain the natural features and resources for the property interest subject to eminent domain, to provide habitat for native plants and animals, to control runoff of sediment and to improve and maintain water quality, including providing environmental protection for surface waters of portions of the unnamed tributary to Chinquapin Creek and its tributaries.

WHEREAS, the proper officials or representatives of the Town of Pilot Mountain have been unable to acquire the needed interest in this property by a negotiated conveyance.

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1. Town of Pilot Mountain shall acquire by condemnation for the purposes stated above, the property and interest described as follows: Conservation Easement 35 feet on either side of the center line of an unnamed tributary to Chinquapin Creek on property deemed by the State to qualify as a riparian buffer, addressing the protection, including but not limited to, clean-up and prevention of pollution of the State surface waters and the establishment of a network of riparian buffer greenways. A more complete description is attached and incorporated herein by reference on Exhibit "A" and an illustration of the conservation easement area is on Exhibit "A-1"
2. The attorneys representing the Town of Pilot Mountain are directed to institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes to acquire the property herein described.
3. Complaints and ancillary paperwork in connection with the eminent domain actions can be signed by the Town Manager.

In witness whereof, I have hereunto set my hand and hereunto affixed the corporate seal of said Town, this the 10th day of February 2020.

Holly Utt, Town Clerk

Town of Pilot Mountain, North Carolina

FY 2019 – 2020 Budget Ordinance

Amendment No. 2020-04

BE IT ORDAINED by the Pilot Mountain Board of Commissioners that the 2019-2020 Budget Ordinance be amended as follows:

REVENUES -

Increase 10-3510-0000 – Court Costs	\$5,700.00
Increase 10-2010-2004 – Prior Year Tax Collection	\$4,600.00
Increase 10-3350-0900 – Summer Concert	\$11,500.00
Increase 10-3610-0000 – Cemetery-Sale of Lot	\$1,400.00
Increase 10-3837-1000 – ABC Law Enforcement Contribution	\$2,110.00
Increase 10-3831-4930 – Recreation Allocation	\$75,000.00

EXPENDITURES -

Increase – General Government	\$6,000.00
Increase – Planning & Economic Development	\$86,500.00
Increase – Public Safety	\$2,110.00
Increase – Transportation	\$5,700.00

Adopted this 10th day of February, 2020

Evan Cockerham, *Mayor*

Holly Utt, *Town Clerk*

Explanation of Amendment:

1. To appropriate funds to account for unforeseen revenues and expenses.



TOWN OF PILOT MOUNTAIN
BOARD OF COMMISSIONERS MEETING

FY 2020 Budget Amendment 4	
<u>Background Information:</u>	
This budget amendment will recognize additional revenue and expense from the Summer Concert Series, unexpected revenue is several categories, and payment from the Armfield Civic Center for the playground. The amendment also appropriates these additional revenues across several functional areas.	
<u>Staff Recommendation:</u>	Staff recommends that the Board approve FY 2020 Budget Amendment 4
<u>Possible Board of Commissioner Actions</u>	
• Approve FY 2020 Budget Amendment 4 • Deny approval of FY 2020 Budget Amendment 4 • Table to a later meeting • Take no action	
<u>Attachments</u>	
• FY 2020 Budget Amendment 4	

**Pilot Mountain Town Hall
124 West Main St.
Pilot Mountain, NC 27041**



**(Phone) - 336.368.2247
(Fax) - 336.368.9532
www.pilotmountainnc.org**

MEMORANDUM

TO: Mayor and Board of Commissioners
FROM: Michael Boaz, Town Manager/Finance Officer
DATE: February 5, 2020
RE: February 2020 Manager's Report

- The financial report for January is not included in your packet. I have not had the time in the office this week to balance bank statements and get that report prepared. I will try and have it done by the meeting on Monday.
- I failed to announce at last month's meeting that we have been accepted into the Downtown Associate Community Program. We will begin working with staff from the NC Main Street Center in January 2021. This is great news for our downtown efforts and is something that the Town has been working towards for a number of years.
- We are continuing to work on getting the easements for the water line project. We have about 50% of them and will be sending out additional notices to those that have not signed.
- We are also continuing to work on getting some easements that are necessary for the Sunset Sewer line project.
- There is no PW report in this month's packet. We have made a Work Order software upgrade and staff is still learning how to use the system and I could not get an acceptable report to print. I will have this corrected by next month.
- I have included the report for the Rural Center's assessment of the Town and its need for a revolving loan program for businesses. We can discuss the findings in this report at a later time, probably during the retreat.
- I issued an RFP for help in creating an update to our Land Use Plan and the creation of a Comprehensive Plan for the Town. We are required to have a Comp Plan in place prior to July 1, 2022. This is a requirement of new legislation passed during the most recent legislative session. We received three proposals and I would like to recommend to the Board that it interview two of the firms. One is Benchmark and the other is Mosaic. The third proposal was from WithersRavenel, and it was a good proposal but it is significantly more expensive than the other two. I have included the two proposals, with the pricing information blacked out.
- We have received an application for a rezoning of property on Golf Course Road. The property is adjacent to the PART lot and the plan is to build affordable housing units on this property, assuming the rezoning and annexation are approved and the project is awarded tax credits from the NC Housing Finance Agency.

PROJECT UPDATES

1. Depot Street Stream Restoration Project: We have been awarded three grants, totaling \$1,100,000 for this project. This is enough money to do most of the stream restoration work on project. We have completed the eminent domain process that the Board authorized. We have just a couple of other straggler properties that we need to get the easement from.
2. Water/Sewer Regionalization/Interconnection Study: This project has been closed by the State as all final reports have been approved and all funds have been received.
3. Landfill Rehabilitation Project: The investigation phase of this project is completed. We are waiting on the State to decide what remedial action is necessary and for this work to be scheduled.
4. Main Street National Register District: We are working with some property owners in the downtown area to possibly make some changes to their buildings to increase the number of contributing properties.
5. Street Paving Project: The funding is under final review by USDA.
6. Sunset Sewer Sub-Basin Project: All plans have been approved and we are working to secure necessary easements.
7. Water Treatment Upgrade: Plans have been approved by DEQ. We are working to secure the necessary easements.
8. Streetscape Project: Duke Energy has started the design process for moving the power lines. WR is completing the design and developing cost estimates.
9. WWTP & Pump Station Project: The preliminary engineering report has been submitted and the State has provided comments. We should have this report approved in the near future.
10. Asset Inventory & Assessment Project: WR has done a good bit of the field work on locating water valves and sewer manholes. We will be doing some smoke testing of sewer lines in the spring.

Statement of Proposal

January 27, 2020

Professional Planning Services for

Comprehensive Plan Town of Pilot Mountain, North Carolina

BENCHMARK

Proposal Contact Information

Benchmark Planning
400 Clarice Avenue, Suite 130
Charlotte, NC 28204

Jason Epley, AICP, President

jepley@benchmarkplanning.com
704.933.5990 (Office)
704.305.4381 (Mobile)

BENCHMARK
benchmarkplanning.com

CHARLOTTE | ST. LOUIS

800.650.3925

BENCHMARK

400 Clarice Ave, Ste 130
Charlotte, NC 28204
800.650.3925
benchmarkplanning.com

January 27, 2020

Michael Boaz
Town Manager
Town of Pilot Mountain
124 W Main St
Pilot Mountain, NC 27041

RE: Request for Proposals for Comprehensive Planning Services

Dear Mr. Boaz,

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

As our qualifications demonstrate, Benchmark's core team members assigned to this project possess a diverse array of professional planning experience working on similar projects in communities across the country. Specifically, we have experience working with the Town of Pilot Mountain on the Unified Development Ordinance, the Streetscape Master Plan and a variety of other projects as part of our contracted zoning and code enforcement administration services.

Benchmark staff will complete the project with our in-house staff and expertise. We propose completing the project by April 2021 utilizing the following key phases:

- Phase 1 - Project Initiation & Background Research
- Phase 2 - Visioning & Development of Goals
- Phase 3 - Objective & Strategy Development
- Phase 4 - Draft Plan Development & Review
- Phase 5 - Final Plan Development & Review
- Phase 6 - Adoption Process

As requested in the RFP, Benchmark does not have any conflicts of interest with the Town and we are able to utilize the standard contract as proposed by the Town. In addition, we maintain insurance that meets the Town's requirements.

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

Respectfully,

A handwritten signature in blue ink, reading "Jason M. Epley". The signature is fluid and cursive, with a large initial "J" and "E".

Jason M. Epley, AICP
President

SECTION 1: CONSULTING TEAM

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

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

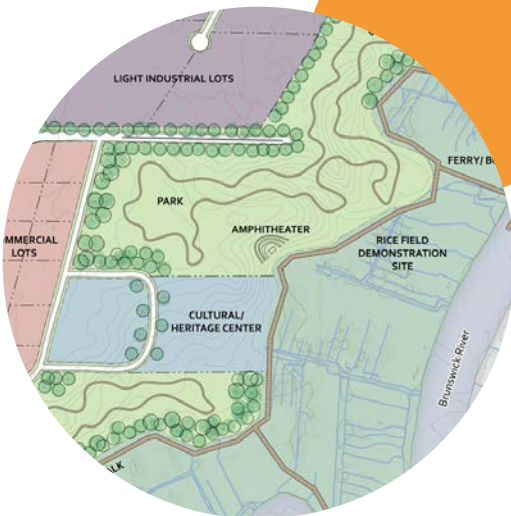
Comprehensive Planning

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

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

Growth Management

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



4.4.6.2 Non-Residential Building Yard Standards

TABLE 4.15: NON-RESIDENTIAL BUILDING YARD STANDARDS

Criteria	BASE STANDARD		PERFORMANCE STANDARD	
	Less Than 20,000 square feet	Greater Than 20,000 square feet	Less Than 20,000 square feet	Greater Than 20,000 square feet
Width	3 feet	5 feet	3 feet	5 feet
Small Trees	N/A	N/A	N/A	N/A
Shrubs	2 per 10 linear feet of building yard	3 per 10 linear feet of building yard	2 per 10 linear feet of building yard	3 per 10 linear feet of building yard
Mulch	Pine needles, mulch, or landscaping rock	Pine needles, mulch, or landscaping rock	Pine needles, mulch, or landscaping rock	Pine needles, mulch, or landscaping rock
Boulders	Optional	Optional	Optional	Optional

Landscaping boulders used to meet the requirements of this section shall be a minimum of 3 feet in diameter. Each shrub allows the reduction in required shrubs at a rate of 3 shrubs per boulder. A maximum of 30 percent of required shrubs shall be retained.

FIGURE 4.20: NON-RESIDENTIAL BUILDING YARD EXAMPLE

4.33

ARTICLE 4 DEVELOPMENT STANDARDS

analyses to prepare strategies and policy recommendations that help your community realize the preferred growth scenario and maximize the benefits that it realizes from new growth.

Development Regulations

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

Public Outreach and Engagement

Our team members facilitate successful public involvement and consensus building through stakeholder interviews, charrettes, pop-up events, focus group meetings and workshops. We leverage the power of technology to support our public engagement activities and facilitate ongoing engagement throughout the planning process, which includes the use of interactive online engagement and real-time digital polling during public meetings. In addition, we often work with partners such as Publicinput.com when more extensive public engagement is desired.

Urban Design & Placemaking

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

GIS Mapping & Analysis

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



Transportation Planning

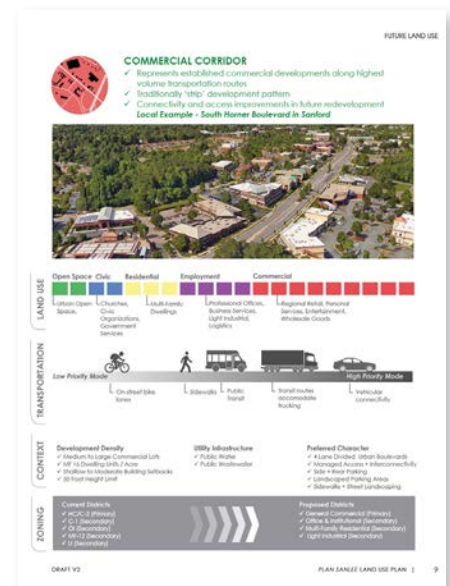
Our planners understand the critical linkages between transportation and land use, and we strive to seek innovative solutions to our clients' transportation needs. Whether it is identifying new highway corridors to spur economic development, reimagining a downtown streetscape, or planning routes for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

Economic Development

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

Sustainability

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



Project Manager & Project Team

The project team selected to assist the Town of Pilot Mountain was chosen based on their unique skills and extensive experience working with similar communities. Benchmark's President, Jason Epley, AICP, will be the Project Manager responsible for the completion of the project on-time and on-budget. Jason has over 25 years of experience in the planning profession, and has served in a variety of roles over his career, including as a planner for local governments in North and South Carolina, as a regional planner with the North Carolina Department of Commerce and, for the last 13 years, as a consultant in private practice serving a national client base. Andy Goodall will be serving as the Assistant Project Manager and Lead Planner - assisting Mr. Epley with the overall scope of the project, organizing the project team, and directing the day-to-day planning effort. Serving as the Town's Planner, Mr. Goodall has extensive knowledge concerning Pilot Mountain understanding the development trends and assisting with the preparation of the Unified Development Ordinance. Our Senior Planner, Vagn Hansen, AICP, will provide guidance and assistance on the overall development of the Comprehensive Plan. In addition, other Benchmark staff contributing to the project include Bridget Callea, AICP-C, Monika Gehl, LEED Green Associate, and Ben Barcroft, LEED Green Associate, who will all assist with the research and the basic tasks of development of the Comprehensive Plan.

Team Member	Project Roles
Jason Epley, AICP	Project Manager - 15% of contract work
Andy Goodall	Assistant Project Manager / Senior Planner - 40% of contract work
Vagn Hansen, AICP	Senior Planner - 15% of contract work
Bridget Callea, AICP-C	Urban Planner - 10% of contract work
Monika Gehl, LEED Green Assoc	Urban Designer - 5% of contract work
Ben Barcroft, LEED Green Assoc	Urban Planner - 15% of contract work



JASON M. EPLEY, AICP

President & CEO | Benchmark

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

Education

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

Certifications/Memberships

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

Relevant Experience

Comprehensive Plan
Blowing Rock, NC

Comprehensive Plan
Aiken, SC

Comprehensive Plan
Covington, VA

Comprehensive Plan
Shepherdstown, WV

Comprehensive Plan
Waxhaw, NC

Comprehensive Plan
Alleghany County, VA

Downtown Master Plan
Concord, NC

Downtown Master Plan
Suffolk, VA

Redevelopment Study
Wilmington, NC

Redevelopment Study
Chapel Hill, NC

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

US 52 Corridor Plan & Land Use Plan
Midway, NC



ANDY GOODALL

Senior Planner | Benchmark

Mr. Goodall has 12 years of experience in local government planning and zoning administration. His experience includes comprehensive planning, zoning administration and enforcement, floodplain administration, subdivision administration, and geographic information system analysis. Prior to joining Benchmark, Mr. Goodall served both as a county and municipal planner for Rowan County and China Grove where he was responsible for facilitating current and long-range planning duties, including the Rowan County Eastern and Western Area Land Use Plans. Currently, Mr. Goodall serves as the Director of Planning and Development for the City of Mount Airy, as well as the Town Planner for the Pilot Mountain.

Education

MA Geography, UNC Charlotte

BA Geography, UNC Charlotte

Certifications/Memberships

Member, American Planning Association

Relevant Experience

Comprehensive Plan
Mount Airy, NC

Redevelopment Plan
Mount Airy, NC

Unified Development Ordinance
Pilot Mountain, NC

Land Use Plan
Erwin, NC

Comprehensive Plan
Yadkinville, NC

Land Use Plan
Rowan County, NC

Statewide Rail-served Industrial Site
Analysis
NC Railroad Company

Historic Preservation Planning
Mount Airy, NC

Ordinance Updates
Yadkinville, NC

Ordinance Updates
Mount Airy, NC

ETJ Boundary Study
Mount Airy, NC

Zoning Map Amendments
Mount Airy, NC



VAGN K. HANSEN, AICP

Senior Planner | Benchmark

Mr. Hansen brings over 16 years of experience in the planning profession to the consulting team. He has worked with large and small municipalities, as a consultant for the NC Department of Commerce and has been in private practice for the last 10 years. Mr. Hansen specializes in comprehensive planning, geographic information systems, military planning and land use regulations. In addition to his consulting practice, Mr. Hansen has supervised municipal planning and zoning administration services for several of Benchmark's client communities in North Carolina and South Carolina over the years.

A primary focus of his practice is performing complex spatial analyses to help local governments make informed decisions on land use, infrastructure, and related growth management policies. Recently, Mr. Hansen managed the design and creation of a statewide GIS database for use in industrial site selection by the North Carolina Railroad Company (a for profit corporation owned by the State of North Carolina), which has subsequently been utilized to identify nearly 3,000 potential industrial sites for rail served industry in the state, and which is now being spun-off by NCRP as a general economic development site selection tool.

Education

MA Applied Geography, University of North Carolina - Greensboro

BA Geography, University of North Carolina - Wilmington

Certifications/Memberships

Member, American Institute of Certified Planners

Member, American Planning Association

Relevant Experience

Comprehensive Plan
Aiken, SC

Comprehensive Plan
Waxhaw, NC

Comprehensive Plan
Blowing Rock, NC

Comprehensive Plan
Covington, VA

Neighborhood Plan
Cape Girardeau, MO

Zoning Ordinance
Morganton, NC

Comprehensive Plan
Covington, VA

Comprehensive Plan
Gatesville, TX

Comprehensive Plan
Shepherdstown, WV

US 52 Corridor Plan & Land Use Plan
Midway, NC

Growth Analysis
Holly Springs, NC

Comprehensive Plan
Weaverville, NC



BRIDGET CALLEA, AICP-C
Urban Planner | Benchmark

Ms. Callea recently joined Benchmark Planning in June of 2019. Prior to joining Benchmark, Ms. Callea was a Planner with WGI, a national design firm in the public and private infrastructure markets. Ms. Callea holds a Master's degree in Urban and Regional Planning from Florida State University where she received the APA-FL Chapter Outstanding Planning Student of the Year and a Bachelor of Arts degree in Architectural Studies from Hobart & William Smith in Geneva, New York. Ms. Callea specializes in comprehensive planning, transportation planning and urban design, assisting the Benchmark Planning team with meeting facilitation, background research, plan illustration, GIS mapping, and related project tasks.

Education

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

Certifications/Memberships:

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

Relevant Experience

Comprehensive Plan
Archdale, NC

Comprehensive Plan
Colleton County, SC

Comprehensive Plan Update
Hardeeville, SC

Industrial Redevelopment Feasibility
Fletcher, NC

Development Code Updates
Delray Beach, FL

Code Amendments
West Palm Beach, FL

Future Land Use Amendments
Palm Beach County, FL

Complete Streets Project
West Palm Beach, FL

Downtown Parking Approvals
Lake Worth, FL

Master Plan Amendments
Palm Beach County, FL

Outdoor Activity/Entertainment
Overlay District Feasibility
St. Lucie County, FL

Corridor Streetscape Plan
Palm Beach County, FL



MONIKA GEHL, LEED GREEN Associate
Urban Designer | Benchmark

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

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

Education

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

Certifications/Memberships:

LEED Green Associate
Member, American Planning Association

Relevant Experience

Downtown Master Plan
Suffolk, VA

Downtown Master Plan
Myrtle Beach, SC
Comprehensive Plan
Alleghany County, VA

Redevelopment Study
Chapel Hill, NC

Redevelopment Study
Greenwood, SC

Neighborhood Plan
Cape Girardeau, MO

Comprehensive Plan
Covington, VA

Comprehensive Plan
Gatesville, TX

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

Regional Land Use Study
Fayetteville, NC

Redevelopment Study
Navassa, NC

Small Area Plan
Killeen, TX



BEN BARCROFT, LEED GREEN Associate
Urban Planner | Benchmark

Mr. Barcroft joined the Benchmark team in 2017 after completing his Master's degree in City and Regional Planning at The Ohio State University. Prior to joining Benchmark, Mr. Barcroft served as a Planner with the city of Upper Arlington, a first-ring suburb of Columbus, and the Ohio Department of Transportation. In addition to his MCRP degree, Mr. Barcroft holds a Bachelor of Arts degree in Environmental Science from Wright State University. Mr. Barcroft specializes in zoning and subdivision administration, comprehensive planning, environmental planning, natural resource protection, and assisting the Benchmark Planning team with background research, GIS mapping, and related project tasks.

Education

MCRP City & Regional Planning, The Ohio State University
BA Environmental Science, Wright State University
AS Environmental Resources Management, Ohio State - ATI

Certifications/Memberships:

LEED Green Associate
Member, American Planning Association

Relevant Experience

Comprehensive Plan
Archdale, NC

Comprehensive Plan
Mount Airy, NC

Historic Preservation Planning
Mount Airy, NC

Unified Development Ordinance
Boiling Springs, NC

Comprehensive Plan
Fayette County, OH

Comprehensive Plan
Yadkinville, NC

Ordinance Updates
Yadkinville, NC

Ordinance Updates
Mount Airy, NC

ETJ Boundary Study
Mount Airy, NC

Zoning Map Amendments
Mount Airy, NC

Unified Development Ordinance
Pilot Mountain, NC

Downtown Redevelopment Area
Boundary Study
Mount Airy, NC

SECTION 2: PROJECT EXAMPLES



Comprehensive Plan City of Mount Airy, North Carolina

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

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



GRANITE



GROOVES



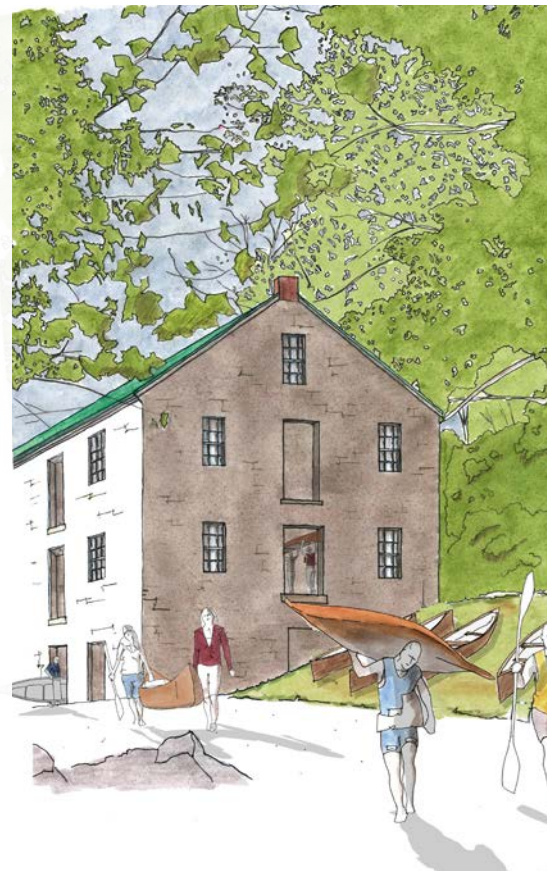
ROCKING



GRAPES

Contact:
Phone:
Email:

Barbara Jones, City Manager
336.786.3502
bajones@mountairy.org



Comprehensive Plan

Shepherdstown, West Virginia

Shepherdstown is a historic university town that is situated on the Potomac River in the far western exurban reaches of the Washington, DC metro region. As the oldest incorporated municipality in the state of West Virginia, Shepherdstown's rich history is well preserved in its historic downtown and neighborhoods that grew up around the bustling river trade associated with the Chesapeake & Ohio Canal. From its beginnings as a center of river trade, Shepherdstown has evolved into a hub for artists and cultural events, including the internationally renowned Contemporary American Theater Festival



In 2013, Shepherdstown engaged Benchmark to prepare an update to its comprehensive plan. The primary focus of the plan was the need to preserve the rich historic, cultural and environmental fabric of the community and surrounding agricultural landscape. The successful planning effort led to the adoption of a Growth Management Boundary in coordination with Jefferson County, which, along with a range of new land use policies, has established a clear path toward a sustainable future for the community.

Contact:
Phone:
Email:

David Rosen, Town Council Member
304.876.2312
rosend@gmail.com

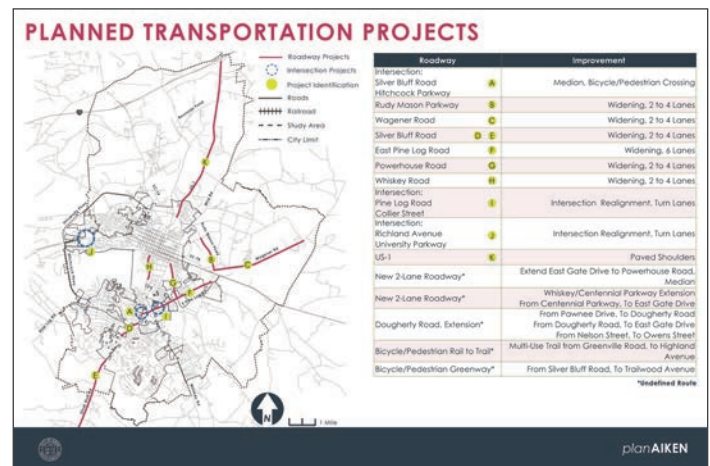


Comprehensive Plan

City of Aiken, South Carolina

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

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



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



Comprehensive Plan

Blowing Rock, North Carolina

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

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

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

Middle Fork Greenway Development Con-

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



Contact:
Phone:
Email:

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



Comprehensive Plan

Town of Bermuda Run, North Carolina

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

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

The updated plan was adopted in November 2017 and sets the "blueprint" for the future of Bermuda Run with a bold,

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

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



Comprehensive Plan and Land Use Regulations (2009 and 2019)

Colleton County and Town of Cottageville , South Carolina

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

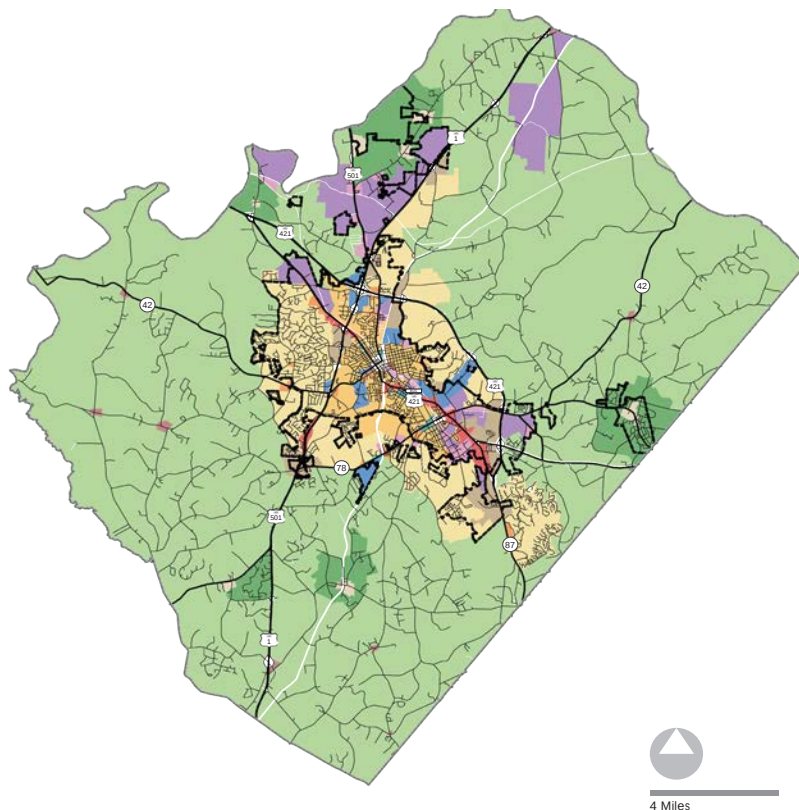
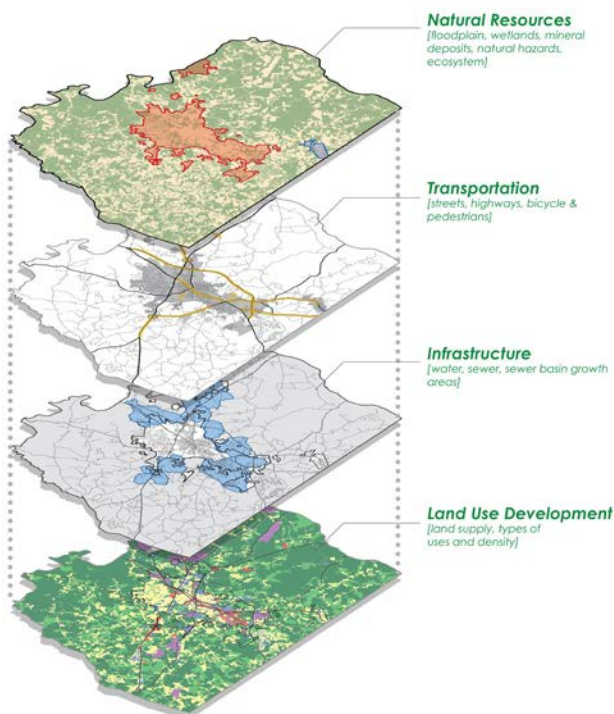


In 2018, the County retained the services of Benchmark to prepare the current 10-year update to the Comprehensive Plan. The process has included stakeholder meetings, a public survey and public meetings at three locations across the county. The plan update is a joint plan, including the Town of Cottageville's jurisdiction. An emphasis was placed on protecting the County's natural resources and sense of place, directing growth toward the county's municipalities where infrastructure can accommodate development. The plan is scheduled for adoption in December 2019.

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

FACTORS INFLUENCING THE DEVELOPMENT OF THE FUTURE LAND USE PLAN

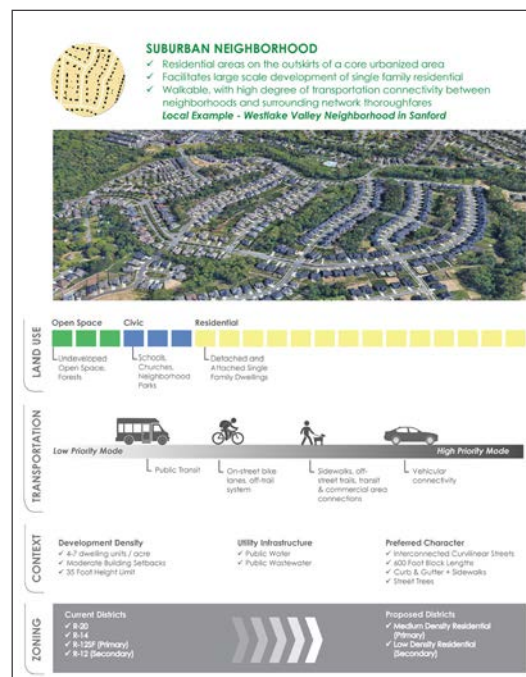
Background information about the area and its capacity for growth, coupled with the community input and land use plan vision, helped guide the development of the Future Land Use Place Type Map



Multi-Jurisdictional Land Use Plan Sanford / Broadway / Lee County, North Carolina

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

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



Contact:
Phone:
Email:

Marshall Downey, AICP, Planning Director
919.718.4657
marshall.downey@sanfordnc.net



Comprehensive Plan / CAMA Land Use Plan Updates

Town of Nags Head, North Carolina

Benchmark worked closely with the Town of Nags Head staff to prepare key components of the Comprehensive Plan and CAMA Land Use Plan updates. As part of the process, Benchmark led the development of the vision, guiding principles, strategies and goals for the plan. Benchmark prepared the project graphics and branding, creating a project website as a public outreach tool. In addition, Benchmark helped facilitate stakeholder interviews with elected officials, volunteer boards, staff, business leaders, developers and technical experts that reached about 70 individuals. Benchmark also participated in and helped lead several comprehensive plan advisory committee meetings, and several community meetings to develop the first draft of the plan. One of the unique elements of the plan included the identification of character areas that helped inform the policies and actions of the plan. After

completing the initial draft, which included integrating CAMA compliant strategies and a detailed policy and action implementation matrix, Benchmark's contract work on the plan was completed. The Town Staff carried the draft plan forward, preparing the final draft of the plan that was adopted in 2017.

Contact: Holly White AICP, Principal Planner
Phone: 252.449.6041
Email: holly.white@nagsheadnc.gov





Joint Comprehensive Plan

Alleghany County / City of Covington, Virginia

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



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



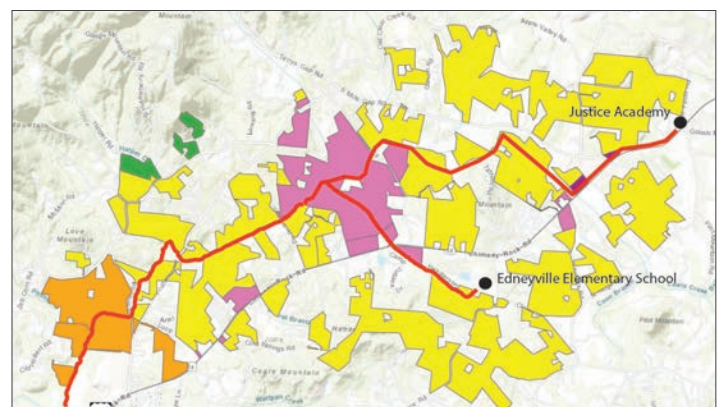
Utility Service Area Growth Analysis

Henderson County , North Carolina

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

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

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



Contact:
Phone:
Email:

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

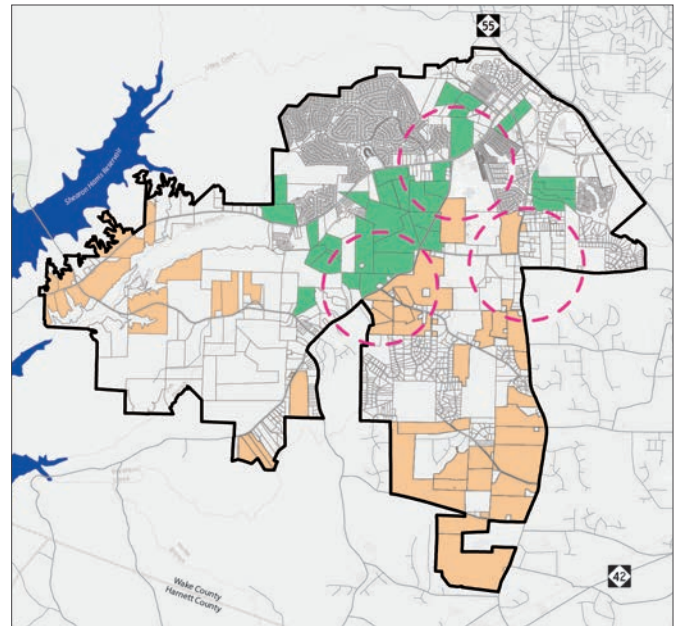


Southern Area Planning Initiative

Town of Holly Springs, North Carolina

Holly Springs (pop. 30,021) is a fast-growing community located in suburban Wake County, near Raleigh and the Research Triangle Park (RTP). The Town has experienced significant growth over the last two decades, with ongoing opportunities for additional growth in the southern area of the community. Benchmark worked with the Town of Holly Springs to prepare a residential land development study as part of the town's Southern Area Planning Initiative.

The purpose of the study was to examine the residential land supply, development capacity, utility extension requirements, municipal service costs, and revenue generation potential in the study area. This information was used to demonstrate the capacity of the study area to accommodate anticipated growth and determine the net residential development density necessary to achieve a positive revenue generation outcome for the town (for both general and enterprise funds). The results of the study served as one portion of the base of information used by the Town to inform the overall direction of the for growth and development in the Southern Area.



Contact:	Gina Clapp, AICP, Planning Director
Phone:	919.557.3928
Email:	Gina.Clapp@hollyspringsnc.us



Downtown Master Plan

City of Suffolk, Virginia

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

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

Contact: Claire Jones, AICP, Comprehensive Planning
Phone: 757.514.4060
Email: cljones@suffolkva.us



Plan implementation status

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



Downtown Master Plan

City of Concord, North Carolina

Concord, NC (pop. 78,066) commissioned Benchmark to prepare a Downtown Urban Design Plan and final Master Plan document. Concord is on the northern border of Charlotte, NC and is home to several large tourism draws including the Charlotte Motor Speedway, zMAX Dragway, Concord Mills Mall, and Great Wolf Lodge. Concord is also the home of Carolina's Medical Center and an array of related medical facilities serving the northern Charlotte metro area. In addition, Concord continues to grow its economy with industrial and distribution facilities being developed in its International Business Park and at its burgeoning commercial airport.

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

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

Plan implementation status

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



Downtown Vision & Streetscape Master Plan

Town of Pilot Mountain, North Carolina

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



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



Recent Development Projects (2014-2017)

Hotel Accommodations

- A Courtyard by Marriott
- B Hampton Inn Hotel
- C Embassy Suits Hotel
- D aLoft Hotel

Retail

- A Farmin' on Front Grocery
- B Port City Marina & Restaurants
- C Edward Teach Brewery

Public

- A Riverwalk Extension
- B North Waterfront Park
- C Riverfront Park Repair
- D Riverplace (Water St Deck)
- E Multi-Modal Center (Phase 1)
- F Conlon Pier

Institutional

- A Community College Fine Arts Center
- B 101 N Third Office Building
- C County Administration Building
- D 21 S Front (NextGlass anchor tenant)

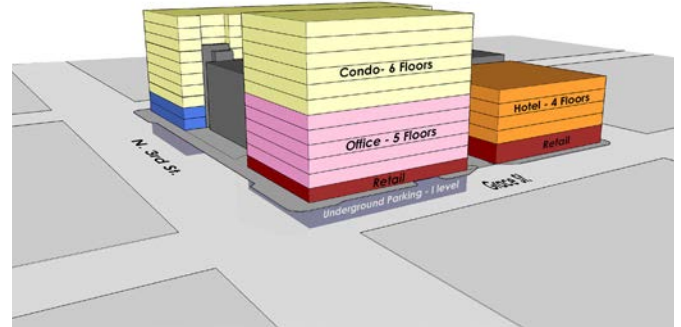
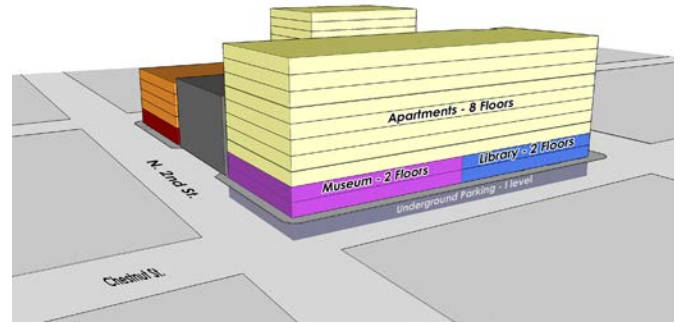
Residential

- A City Block Apartments
- B Sawmill Point Apartments
- C Pier 33 Apartments

- ***** Greater Downtown Area Boundary
- Site Boundary
- Parcel Lines



▲ Recent Downtown Development Projects



▲ Museum/Library, Mixed-Use Development Scenario

Downtown Wilmington Redevelopment Plan, Site & Market Analysis

New Hanover County, North Carolina

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

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

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

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

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



Downtown Master Plan

City of Myrtle Beach, South Carolina

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



Plan implementation status

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

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

Example Projects (within last 2 years)	Project Location	Primary Role
Comprehensive Plan	Archdale, NC	Principal Firm
Zoning & Subdivision Ordinance	Onslow Co., NC	Principal Firm
Downtown Master Plan	Suffolk, VA	Principal Firm
Sign Ordinance	Blowing Rock, NC	Principal Firm
Redevelopment Plan	Chapel Hill, NC	Urban Design, Market Analysis
Unified Development Ordinance	Pilot Mountain, NC	Principal Firm
Development Regulations	York County, SC	Public Engagement / Coding
Downtown Block Redevelopment - Phase II	Wilmington, NC	Principal Firm
Multi-Jurisdictional Land Use Plan	Sanford/Lee Co., NC	Principal Firm
Community Survey	Weddington, NC	Principal Firm
Downtown Master Plan	Myrtle Beach, SC	Principal Firm
Regional Land Use Study	Wilmington, NC	Principal Firm
Regional Land Use Study	Miami Co, IN	Land Use Analysis
Brownfield Redevelopment Plan	Navassa, NC	Public Engagement & Planning
Discovery Place Science Master Plan	Charlotte, NC	Stakeholder Engagement
US 321 / Valey Boulevard Corridor Plan	Blowing Rock, NC	Principal Firm
Neighborhood Plan	Cape Girardeau, MO	Principal Firm
Residential Land Development Study	Holly Springs, NC	Growth & Land Use Analysis
Land Development Study	Henderson Co., NC	Growth & Land Use Analysis
Long Range Planning Review	Fayetteville, NC	Principal Firm
Downtown Vision & Streetscape Plan	Pilot Mountain, NC	Principal Firm
Redevelopment Study	Greenwood, SC	Planning & Market Analysis
Indoor Recreation Facility Study	Burlington, NC	Public Engagement
Comprehensive Plan	Gatesville, TX	Principal Firm
Comprehensive Plan	Covington, VA	Principal Firm
Comprehensive Plan	Alleghany Co., VA	Principal Firm
Small Area Plan	Killeen, TX	Principal Firm
Regional Land Use Study	Fayetteville, NC	Principal Firm
Comprehensive Plan	Aiken, SC	Principal Firm
Comprehensive Plan	Bermuda Run, NC	Principal Firm
Comprehensive Plan	Mt. Pleasant, NC	Principal Firm
Comprehensive Plan	Jamestown, NC	Principal Firm
Regional Land Use Study	Sumter, SC	Land Use Analysis
Downtown Block Redevelopment - Phase I	Wilmington, NC	Planning & Market Analysis
Comprehensive Plan	Person Co/Roxboro, NC	Principal Firm
Downtown Raleigh Alliance Strategic Plan	Raleigh, NC	Principal Firm



SECTION 3: PROJECT SCOPE & SCHEDULE

Our team has prepared a draft scope of work and schedule to prepare the Comprehensive Plan by April 2021. We propose working closely with the Planning Board and Town Council to develop the Plan, envisioning up to 7 meetings with the Planning Board, 2 meetings with Town Council, a community survey and two public drop-in meetings.

Project Phase	Timeframe
Phase I: Project Initiation & Background Research • Kickoff Meeting with Planning Board • Demographic & Economic Analysis • Existing Conditions • Planning Board Meeting • Develop public engagement plan and project website	March 2020 - June 2020
Phase II: Visioning & Development of Goals • Community Survey (Digital/Online) • Planning Board Meeting	June 2020 - August 2020
Phase III: Objective & Strategy Development • Planning Board Meeting • Mid-Point Presentation to Town Council • Community Drop-in Meeting	August 2020 - September 2020
Phase IV: Draft Plan Development & Review • Prepare Draft Plan • Planning Board Meeting	September 2020 - November 2020
Phase V: Final Plan Development & Review • Community Drop-in Meeting • Planning Board Meeting	November 2020 - December 2020
Phase VI: Adoption Process • Planning Board consideration and recommendation • Adoption presentation to the Town Council • All final deliverables prepared	January 2021 - April 2021



SECTION 4: PILOT MOUNTAIN COMMUNITY EXPERIENCE

The Town of Pilot Mountain is nestled within the Yadkin Valley Appellation at the foot of its landmark namesake; the striking pinnacle knob that rises from the ancient Sauratown Mountain chain. The town provides opportunities to connect with nature by exploring the beautiful Pilot Mountain State Park and enjoying the richness of its charming downtown and wineries. The Town has the opportunity to develop a Comprehensive Plan that will help maintain its small-town appeal and character, while balancing opportunities for growth with the desire to preserve the unique qualities of the Town.

Benchmark brings significant value added to the Town of Pilot Mountain's Comprehensive Plan process. Our Team has worked with the Town for over five years and has developed a firm understanding of the Town's challenges and opportunities. Due to our significant experience with the Town, we will be able to start the project immediately, devoting more of our professional staff time to the issues that matter most to the Town.

In addition to our extensive local knowledge, Benchmark adds value to the process through our comprehensive planning work across the country. We will leverage our lessons learned from other communities, highlighting the best practices that should be considered by the Town during the Comprehensive Plan process. We look forward to the opportunity of assisting the Town on this project.



SECTION 6: REFERENCES

Comprehensive Plan

Client: Town of Blowing Rock
Contact: Kevin Rothrock, AICP, Planning Director
Phone: 828.295.5240
Email: kevin@townofblowingrocknc.gov

Multi-jurisdictional Land Use Plan

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

Comprehensive Plan

Client: Town of Bermuda Run
Contact: Lee Rollins, Town Manager
Phone: 336.998.0906
Email: lrollins@townofbr.com

BENCHMARK
benchmarkplanning.com

CHARLOTTE | ST. LOUIS

800.650.3925

PROPOSAL FOR

Town of Pilot Mountain Comprehensive Plan

JANUARY 2020



PREPARED BY



WWW.MOSAICCIVICSTUDIO.COM

January 27, 2020

Town of Pilot Mountain
Michael Boaz
Town Manager
124 W Main Street
Pilot Mountain, NC 27041



RE: TOWN OF PILOT MOUNTAIN RFP for COMPREHENSIVE PLAN

Dear Mr. Boaz and Pilot Mountain Commissioners:

Mosaic Civic Studio appreciates the opportunity to present the following proposal for the development of a Comprehensive Plan for the Town of Pilot Mountain. We applaud the Town of Pilot Mountain for taking the first steps toward what will be a thoughtful and participatory planning process to cast a vision for the future of the town. The significance of this project cannot be understated. A cohesive comprehensive master plan will chart the course for Pilot Mountain's future success. Pilot Mountain is strategically located near some of North Carolina's most iconic state parks, providing the best of both worlds with easy access to urban markets in Winston-Salem and destination-quality outdoor recreation opportunities. We recognize that the Town has a significant opportunity to position itself for coordinated growth, economic vitality, and community cohesion through this planning process.

Mosaic Civic Studio is a passionate group of creative professionals who specialize in comprehensive, small town, and rural planning. Our interdisciplinary team brings expertise in main street revitalization, design of civic spaces, and place-branding. Our unique specialization is the result of years of experience executing a variety of projects for a diverse clientele that includes local, state, and federal government agencies, non-profits, and civic organizations. We have been fortunate to collaborate with great partners across North Carolina and Southwest Virginia to deliver projects that are innovative, context-specific, and enduring.

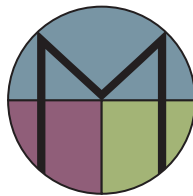
We hope that this proposal will demonstrate our team's commitment to the Town of Pilot Mountain. Mosaic Civic Studio is firmly dedicated to the creation of inspiring places that elevate quality of life and empower communities through authentic, creative, and context-specific planning and design. We would love the opportunity to earn your trust and exceed your expectations with this legacy project. Please do not hesitate to contact us with questions or clarification on our qualifications.

Sincerely yours,

Taylor Gupton Broyhill, AICP
Planning Principal

Teresa Buckwalter, PLA
Design Principal

**We would love the
opportunity to earn
your trust and exceed
your expectations!**



MOSAIC CIVIC STUDIO



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MOSAIC CIVIC STUDIO

FIRM PROFILE

Mosaic Civic Studio, PLLC

PO Box 405
2554 NC 105
Boone, NC 28607
828.719.0177

www.MosaicCivicStudio.com

@mosaiccivicstudio



Mosaic Civic Studio is a landscape architecture, planning, and design firm that collaborates with government agencies, community organizations, and commercial entities throughout the Southeast to create inspiring destinations that elevate quality of life and empower communities through authentic, creative, and context-specific planning and design.

Based in Boone, North Carolina, Mosaic Civic Studio was formed in 2018 out of a desire to provide forward-thinking planning & design services of an exceptional quality. Our practice is founded on the combined 57 years of experience that we have accumulated working for towns, cities, non-profits, and award-winning, innovative firms in the South and Midwest. We take our community and connections seriously, providing a personal approach to every project.

As advocates and citizens of the small towns, communities, civic spaces, and public amenities in our own corner of North Carolina, we are passionate about applying our planning and design skills to cultivate stronger communities and establish destinations that promote economic prosperity and healthy lifestyles.

Firm Ownership & Licensure

Mosaic Civic Studio is a North Carolina Professional Limited Liability Company and a licensed North Carolina Landscape Architecture Firm (certificate number C-539). The firm carries \$1M in commercial general liability insurance coverage and \$1M in professional liability errors and omissions coverage.

Mosaic Civic Studio is proud to be a woman-owned firm.

Disclosures

Mosaic Civic Studio does not have a conflict of interest by performing contracted services for the Town of Pilot Mountain.

Mosaic Civic Studio agrees to utilize the Town of Pilot Mountain's Standard Contract for Services.



PROFESSIONAL

Our practice is founded on the combined 57 years of experience that we have accumulated working for towns, cities, non-profits, and award-winning, innovative firms in the South and Midwest.



PROGRESSIVE

We embrace projects that test our creative-thinking and problem-solving skills to produce innovative design solutions. We never take a cookie-cutter approach to a project.



PERSONAL

We take our community and connections seriously, with a personal investment in the success of every project. Our clients are partners in place-making

PROJECT APPROACH

At Mosaic Civic Studio, we are committed to helping communities harness the power of place to achieve economic prosperity, social cohesion, and environmental harmony. No project better represents the intersection of these goals than the comprehensive planning process. Our approach to the Town of Pilot Mountain's Comprehensive Plan consists of five (5) phases.

1) Discovery & Direction Setting

Mosaic Civic Studio (Mosaic) will conduct a kickoff workshop and town visit with the project Steering Committee and town staff to ensure a clear understanding of expectations, the planning process, timeline, and the Public Engagement Program. The kick-off will include an on-site visioning and ideation session to identify opportunities and challenges face by Pilot Mountain in the coming decades.

2) Research & Analysis of Existing Conditions

During this phase, Mosaic will couple GIS analysis of the built and natural environment with extensive research and review of demographic and economic trends to further identify specific issues, opportunities, and challenges that should be addressed by the plan. Mosaic's research and field analysis, the Steering Committee's institutional knowledge, and a review of previous planning efforts will be used to target key opportunities, solutions, and best planning practices to be tested and expanded through public engagement.

3) Community Engagement

Our experienced team understands that stakeholder and public engagement is at the heart of any project's success. Purposeful and sincere community engagement is critical to cultivating public trust, expanding support for the project, and addressing concerns early in the planning process. Additionally, it allows project leaders to tap into the talents, skills, and knowledge of citizens. The resulting concepts and designs reflect the community's character while meeting practical and functional needs. Our team has extensive experience facilitating public engagement campaigns including design charrettes, public workshops, focus groups, and public surveys. For the Pilot Mountain Comprehensive Plan, we plan to engage the community through two in-person workshops aimed at gauging citizen

opinions on priorities and preferences for Pilot Mountain's future.

The first public workshop will dovetail with the conclusion of the Research and Analysis phase. We propose a drop-in style workshop where citizens can provide their input on the opportunities and challenges for Pilot Mountain.

The second public workshop will focus on gathering citizen feedback on draft vision statements, policy goals, supporting visuals, and the draft future land use map that are developed as a result of the research & analysis phase and public workshop #1.

Mosaic will design a custom promotional mailer as well as social-media specific graphics to advertise and increase awareness of the public workshops.

4) Draft Plan Development

Equipped with guidance from citizens gleaned from the second public workshop, Mosaic will work with the Steering Committee and town staff to develop key policy recommendations according to each planning element. Supporting visuals will be refined and finalized based on public feedback. The bulk of plan development and writing will take place during this stage of the planning process.

5) Final Plan Development

The final document will provide a comprehensive plan for the future of Pilot Mountain in a visually-pleasing layout that clearly communicates shared goals and satisfies the requirements of NC 160D legislation. The final plan will outline specific actions for implementation of policy recommendations. After review of the final draft by the Steering Committee and town staff, Mosaic will present the document to the public and Town Council at a community-wide meeting.

OUR TEAM



TAYLOR BROYHILL, AICP
Planning Principal



TERESA BUCKWALTER, PLA
Design Principal

With a background in local government planning, administration, and GIS, Taylor brings considerable experience to every project. Whether planning for pedestrian, greenway, rail-trail, recreation, or neighborhood-scale projects, her goal is to help communities achieve transformative and enduring results.

Prior to starting Mosaic Civic Studio, Taylor worked as a local government planner and GIS specialist for the Town of Weaverville and City of Lenoir. She has experience as both a client and consultant. This background provides her with a unique perspective and understanding of her local government clients' needs and their responsibilities to citizens and constituents.

EDUCATION

Master of Public Administration,
2013; Appalachian State
University, Boone, NC
Bachelor of Arts in Sociology,
2011; Berry College, Rome, GA

AREAS OF EXPERTISE

Pedestrian & Bicycle Planning,
Recreation Planning
Community Engagement
Small Town Planning

PROFESSIONAL CERTIFICATIONS & ASSOCIATIONS

American Institute of Certified
Planners, 2018–present
American Planning Association,
2016–present, 2016–present
Appalachian State Local
Government Alumni Association,
2013–present

Combining landscape architecture, community and land planning, Teresa Buckwalter, brings a 15-year track record of project management in urban and rural design. Through combining her passions of public space design and outdoor recreation, Teresa has helped a wide range of communities and landowners plan and design their sites with integrity.

Having worked with numerous local government clients throughout her career, Teresa has a keen understanding of the unique needs and challenges faced by public sector entities. She specializes in translating her client's needs into beautiful and functional design solutions that create a distinct sense of place.

EDUCATION

Master of Landscape Architecture,
2001; The University of Michigan,
Ann Arbor, MI
Bachelor of Science, Natural
Resource–Based Recreation
Management, 1993; Michigan
State University, East Lansing, MI

PROFESSIONAL REGISTRATION

Landscape Architect, State of North
Carolina License #1702
Commonwealth of Virginia License
#001969

AREAS OF EXPERTISE

Landscape architecture, Outdoor
recreation planning and design

OUR TEAM

Beth brings over 25 years of experience in graphic design, publishing and website design to Mosaic Civic Studio. Beth applies her design skills to a wide range of projects including place-branding, wayfinding signage, plan layout, and web design. Prior to working in the field of civic planning and design, Beth was a graphic designer and adjunct professor at Appalachian State University where she also received her master's degree in Instructional Technology & Educational Media.

EDUCATION

Masters of Arts, Instructional Technology, 2003
Educational Media Specialist,
Appalachian State University,
Boone, NC

Bachelor of Arts, 1995
Fine Art, Political Science
Appalachian State University,
Boone, NC

AREAS OF EXPERTISE

Brand development,
Logo design,
Website Design,
Marketing Collateral Design,
Wayfinding Signage Design
Document Layout



ELIZABETH JACQUOT
Creative Director

Charlie's goal is to add value to projects by forming new connections, refining technology systems, and digging deep into the data to produce accessible maps that become the baseline for sound decision-making. With extensive experience in spatial problem-solving, Charlie has an eye for detail and a knack for creative mapping solutions. He is proficient in ESRI ArcMap, Python, QGIS, Pix4d, DroneDeploy, and is an FAA Unmanned Aerial System (drone) pilot capable of shooting custom aerial photography. Charlie has spent the past five years honing his GIS and cartography skills to provide the best geodatabase management and most visually-pleasing maps possible.

EDUCATION

Bachelor of Science, Geospatial Geography, 2015; Appalachian State University, Boone, NC

Bachelor of Science, Community & Regional Planning, 2015; Appalachian State University, Boone, NC

AREAS OF EXPERTISE

UAS Pilot: FAA Part 1 07 Certification (Aug 2017)
ESRI ArcMap
Python
QGIS
Pix4d
DroneDeploy
Adobe Creative Suite



CHARLES MYERS
GIS Specialist & Cartographer

TEAM TASK RESPONSIBILITY

TEAM MEMBER	PROJECT ROLE	KEY TASKS	PERCENT OF PROJECT
Taylor Broyhill, AICP	Project Manager & Lead Planner	Management, Public Engagement, Research, Policy writing	55%
Teresa Buckwalter, PLA	Design & Visualization Lead	Develop Supporting Visuals	15%
Elizabeth Jacquot	Graphic Designer	Promotional Materials, infographics, document layout	15%
Charles Myers	GIS Specialist & Cartographer	Data collection, GIS, Map Design	15%

SCOPE OF SERVICES & BUDGET

PHASE 1. DISCOVERY & DIRECTION SETTING.....

- » *Kick off Meeting and Field Analysis* (1 day). Conduct a kick-off meeting with the Steering Committee to ensure a clear understanding of expectations, the planning process, timeline, and Public Engagement Program.
- » Facilitate a brainstorm session with the Planning Board to identify opportunities and challenges.
- » Conduct focus group with Town Department heads.
- » In-depth tour of key areas in Pilot Mtn. led by Town Staff.
- » *Review Existing Plans*. Become familiar with existing town and county planning efforts, initiatives, and policy goals.
- » *Identify Key Issues*. Work with town staff to identify broad issues, opportunities, and challenges.

PHASE 2. ANALYSIS OF EXISTING CONDITIONS AND EMERGING TRENDS.....

- » *Demographics*. Work with Town Staff to compile pertinent demographic data for analysis.
- » Develop representative graphs, tables, and infographics to communicate the most pertinent demographic information.
- » *Existing Conditions and GIS Analysis*. Develop "Existing Conditions" map series.
- » Develop draft Vision Statements.
- » Develop draft Policy Goals.

PHASE 3. COMMUNITY ENGAGEMENT & VISIONING.....

- » Development project theme & brand.
- » Develop print & digital project promotional material.
- » Town Staff will promote the planning process by providing project announcements and information through official social media platform(s). Mosaic will develop the project communication strategy.
- » *Public Workshop #1*. Mosaic will host a drop-in style workshop that includes: introduction; results of existing conditions & emerging trends and; interactive map activity.
- » *Public Workshop #2*. Mosaic host a drop-in style workshop presenting draft vision statements; preliminary policy goals; draft Future Land Use Map; preliminary supporting visual concepts. Mosaic will provide all print materials and presentation boards for both workshops.

PHASE 4. DRAFT PLAN DEVELOPMENT.....

- » *Supporting Visuals*. Develop three (3) renderings and schematics to represent key policy recommendations.
- » Develop Future Land Use Map.
- » *Framework Plan Presentation*: Mosaic will present preliminary recommendations, draft Future Land Use Map, and visual concepts to the steering committee prior to public workshop #2.
- » *Policy Development*. Mosaic will lead all writing associated with recommendations for each Planning Element.

PHASE 5. FINAL PLAN DEVELOPMENT.....

- » *Final Plan Preparation*. Mosaic will author the final plan and assemble the final graphic layout. The final plan will include special "call-outs" and/or case-studies throughout the document to highlight key themes and best practices. A policy linkage map will connect overlapping recommendations from town, county, regional, and state plans.
- » *Chapter & Planning Elements*: The final plan shall have five (5) chapters: Introduction; Town Profile; Community Engagement & Vision; Policy Recommendations and; Implementation
- » *Public Presentation*. After review by Town Staff, Planning Board, and Commissioners, Mosaic will make a public presentation of the Final Plan.

TOTAL FEES

OPTIONAL ADDITIONAL SERVICES

- » Online Public Engagement Survey.....
- » Additional Supporting Visuals.....

PROPOSED TIMELINE & DELIVERABLES



DETAILED PROJECT SCHEDULE

	Mar-20	Apr-20	May-20
1. Discovery & Direction Setting			
1.1 <i>Kick-off Meeting:</i> Field Analysis, Brainstorm Session, & Dept. Head Interviews			
1.2 <i>Review Existing Plans:</i> Town, County, and Regional Plans & Initiatives			
1.3 <i>Identify Key Issues:</i> Work with staff to identify broad issues, opportunities, and challenges			
1.4 Develop Matrix of "Key Issues"			
1.5 Provide detailed Public Engagement Strategy			
2. Research & Analysis of Existing Conditions and Emerging Trends			
2.1 <i>Demographic Data:</i> work with Town Staff to compile pertinent demographic data for analysis			
2.2 Develop graphs, tables, and/or infographics of pertinent demographic information			
2.3 <i>Existing Conditions and GIS Analysis:</i> Develop "Existing Conditions" map series			
2.4 Develop Opportunities, Constraints, & Ideas Map			
2.5 Draft Vision Statements			
2.6 Draft Policy Goals for each of the Planning Elements			
2.7 Develop draft list of potential supporting visuals (3)			
3. Community Engagement & Visioning			
3.1 Development project theme & brand			
3.2 Develop project promotional material for print OR social media			
3.3 Develop a project communication strategy to be implemented by Town Staff			
3.4 Develop professional display boards for Public Workshops provided as digital files to the Town			
3.5 <i>Public Workshop #1.</i> Drop-in style workshop Lead by Town Staff			
3.6 <i>Public Workshop #2.</i> Drop-in style workshop Lead by Town Staff			
3.7 <i>*Optional Online Survey.</i> Seeking similar information and feedback as Public Workshop #2			
4. Draft Plan Development			
4.1 Develop preliminary supporting visuals for Public Workshop #2			
4.2 Develop Draft Future Land Use Map for Public Workshop #2			
4.3 Finalize all supporting visuals for plan document (3)			
4.4 Finalize Future Land Use Map			
4.5 Develop detailed recommendations for each Planning Element			
5. Final Plan Development			
5.1 Assemble final graphic layout.			
5.2 Provide complete plan document to Town Staff, Planning Board, and Commissioners for comment.			
5.3 Make final revisions based on feedback from Town Staff, Planning Board, and Commissioners			
5.4 Public Presentation of final plan & recommendations			
5.5 Provide print-ready PDF and two (2) printed copies of final plan			

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RELEVANT EXPERIENCE & PROJECTS WE LOVE

MOUNT GILEAD MOVING AHEAD: OUR TOWN 2040

MOUNT GILEAD, NC

Mosaic Civic Studio is currently leading a comprehensive planning process in the Town of Mt. Gilead in Montgomery County, NC. The plan seeks to address current problems, determine how to meet future demands, and establish priorities for achieving the shared vision of Mount Gilead in 2040. Mosaic has assisted the Mt. Gilead Planning Board and Town Staff in identifying key issues, developing a public engagement strategy, drafting policy goals, and creating promotional collateral to raise awareness for two public workshops to take place in spring 2020.



RELEVANT EXPERIENCE & PROJECTS WE LOVE

MOUNT GILEAD MOVING AHEAD: OUR TOWN 2040

PROMOTIONAL POSTCARD



MOUNT GILEAD MOVING AHEAD

OUR TOWN 2040

Stay up to date by following on Facebook  Mount Gilead 2040
or by calling Town Hall at 910.439.5111 for more information.

The Town of Mt. Gilead is embarking on a year-long planning process to cast a bold vision for the future of the community! *Mt. Gilead Moving Ahead: Our Town 2040* is a planning initiative that will update and replace the 2009 Land Use Plan.

Once complete, the new plan will:


Define a Shared Vision


Address Current Problems


Meet Future Demands


Establish Priorities

Two public workshops for citizens will provide important opportunities to tell town leaders how you see *Our Town* in 2040. Please mark your calendar with these important dates:

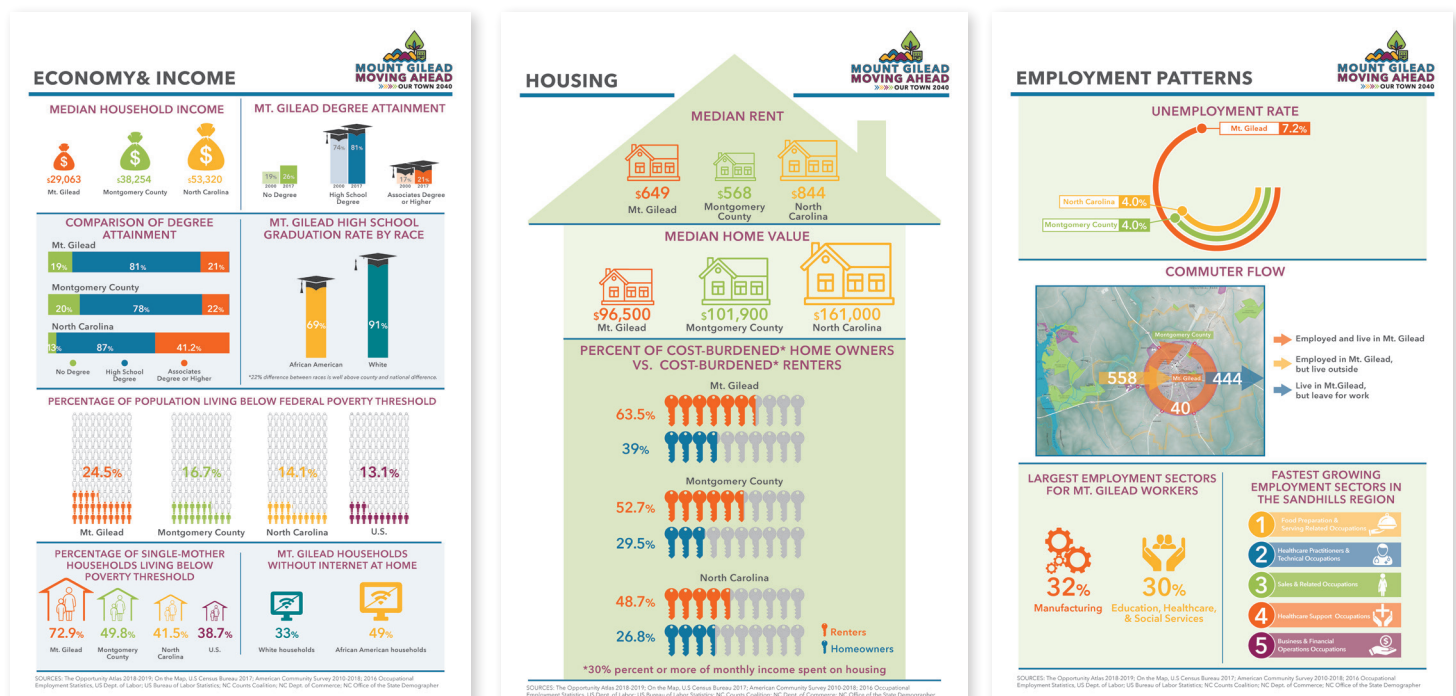
>>> **Workshop #1: Thursday, March 5th, 2020**
5:30-8pm at Highland Community Center

>>> **Workshop #2: Thursday, May 7th, 2020**
5:30-8pm; location to be announced

Please plan to "drop-in" at any point during the workshop to learn more and share your vision for Mt. Gilead.



CUSTOM INFOGRAPHICS



RELEVANT EXPERIENCE & PROJECTS WE LOVE

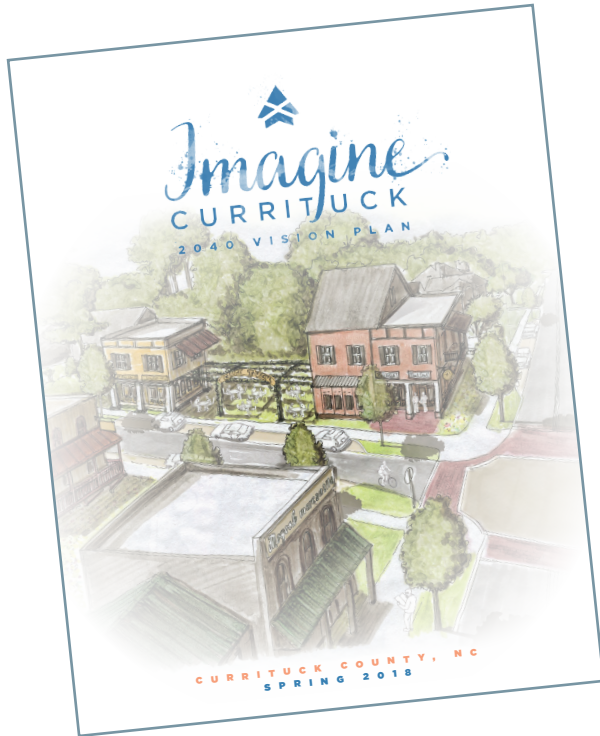
IMAGINE CURRITUCK: 2040 VISION PLAN

CURRITUCK COUNTY, NC

Currituck County's multi-year comprehensive planning process employed a robust menu of community engagement tools including an extensive county-wide digital outreach campaign. The custom project website, blog, promotional video, and online survey were promoted through paid social media advertising that effectively reached over 28,000 full-time residents and second homeowners and resulted in observable spikes in online survey responses. Public comment, feedback, and ideas were essential in guiding the development of recommendations and strategies for the county's future. The plan was truly comprehensive in nature, providing detailed and actionable recommendations for land use, transportation, infrastructure, recreation, economic development, the environment, and sense of place.

KEY FEATURES

- » Demographic Analysis
- » Environmental Analysis
- » Extensive Public Engagement
- » Photo-renderings & Schematics
- » Custom Cartography
- » Reader-friendly document layout & organization



**project completed while employed at dbd planning*

RELEVANT EXPERIENCE & PROJECTS WE LOVE

LAUREL PARK CORRIDOR PLAN

LAUREL PARK, NC

- » **Small area plan** for new mixed-residential neighborhood along NC Hwy. 64
- » Emphasis on pedestrian connectivity
- » Incorporates the Ecusta Trail
- » Provides for pedestrian-friendly neighborhood commercial node
- » Recommendations for stormwater best-practices



Laurel Park Town Center



- » **Town Center plan** for retail and townhome infill development at existing commercial area on NC Hwy. 64
- » Proposed square-footage and phasing
- » Recommendations for visual character and design

RELEVANT EXPERIENCE & PROJECTS WE LOVE

SUNSET DRIVE STREETScape & GATEWAY DESIGN

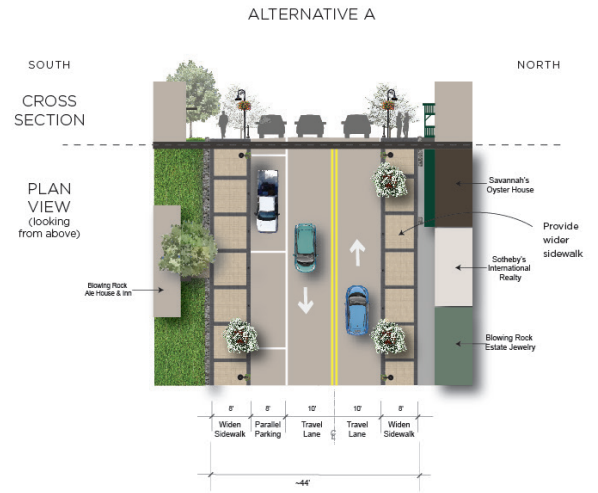
BLOWING ROCK, NC

A dynamic public engagement strategy was imperative to the success of the Town of Blowing Rock's Sunset Drive streetscape design process. More than once, the scope of the community engagement campaign was expanded to include more stakeholders and elicit a meaningful response from as many citizens and residents as possible. The right balance of online outreach and face-to-face meetings reached over 450 stakeholders, resulting in a higher level of community consensus on the aesthetics and functionality of Sunset Drive. In turn, this process will ultimately ensure a greater level of success in implementation.

KEY FEATURES

- » Streetscape design alternatives
- » Photo-realistic gateway design concepts
- » Project Website
- » Public Workshops
- » Focus Groups
- » Questionnaire & Visual Preference Survey

Upper Sunset Near Main Street



**project completed while employed at dbd planning*

RELEVANT EXPERIENCE & PROJECTS WE LOVE

LAUREL CREEK PARK

DAMASCUS, VA

Teresa Buckwalter, PLA has worked with the Town of Damascus as the lead designer for this comprehensive grant-funded revitalization project. Funded through an Appalachian Regional Commission grant, this multi-faceted project includes engineering of a connector walkway throughout town, improving several facades in the downtown and developing a new "Town Green" as a destination.

Teresa has assisted the Town with project management, design consensus, developing construction document and permitting. Construction of the trail and town green will commence in the Summer of 2019.

Once complete, this project will transform downtown Damascus by connecting the landmark Virginia Creeper Trail with downtown Damascus, their planned Appalachian Trail Center and a Riverwalk along the banks of Laurel Creek via a destination-quality bike/walk trail.



**project completed while employed at dbd planning*

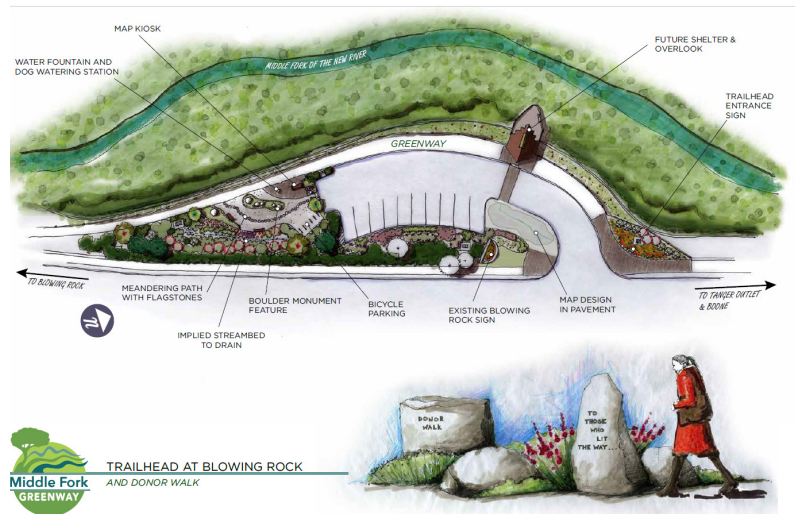
RELEVANT EXPERIENCE & PROJECTS WE LOVE

MIDDLE FORK GREENWAY BLOWING ROCK TRAILHEAD

BLOWING ROCK, NC

Teresa Buckwalter, PLA has worked closely with Middle Fork Greenway for the past four years, helping to develop the vision for the trail and implement key sections of the greenway between Blowing Rock and Boone, NC. The Middle Fork Greenway trailhead in Blowing Rock was completed in the Fall of 2019. This trailhead features a donor acknowledgment area and a place for riders to “gear up” before hitting the greenway. Teresa also collaborated with IONCON structural engineers to design a unique overlook pavilion where visitors can enjoy views of the Middle Fork Creek and learn from educational signage custom-designed for this project.

Mosaic Civic Studio oversaw construction installation of this trailhead in the fall of 2019. The project was funded through NCDOT and local donations. No change orders were needed and the project construction was finalized within budget.

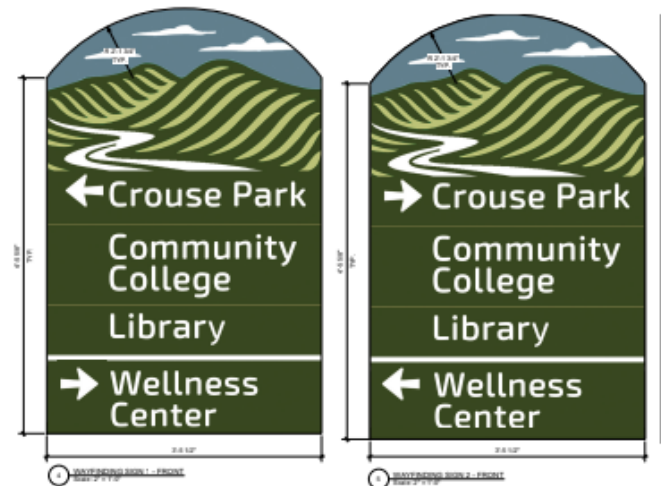


RELEVANT EXPERIENCE & PROJECTS WE LOVE

SPARTA STREETSCAPE REVITALIZATION PLAN

SPARTA, NC

Downtown Sparta's Streetscape Strategy will transform the rural town into a walkable mountain destination. Expanded pedestrian and bicycle facilities on Sparta's Main Street will provide safer access and mobility through the downtown for these important transportation modes. With a redesigned Main Street and new wayfinding signage, Sparta is positioned to experience a surge in downtown economic activity. After adopting the streetscape revitalization plan, the Town has since received a USDA grant to implement the plan's recommendations and begin construction. Mosaic Civic Studio's, Teresa Buckwalter worked closely with Mattern & Craig's Brian Newman to guide Town leadership through planning, design consensus, and visualization.



*project completed while employed at dbd planning

REFERENCES

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MOSAIC
CIVIC STUDIO

**MONTHLY STATUS REPORT OF
OPERATION FOR THE PILOT MOUNTAIN
WATER TREATMENT PLANT**

MONTH: December

YEAR: 2019

OPERATIONS: Plant operated 18 days in December.

MILLION GALLONS OF RAW WATER TREATED	9.052	DAILY AVERAGE RAW WATER TREATED (MGD)	.502
MILLION GALLONS WATER FILTERED	8.692	DAILY AVERAGE WATER FILTERED (MGD)	.482
MILLION GALLONS PUMPED TO SYSTEM	6.606	DAILY AVERAGE WATER PUMPED TO SYSTEM (MGD)	.367

CHEMICALS USED:

ALUMINUM SULFATE	1,056 LBS.
SODA ASH	992 LBS.
CHLORINE	191 LBS.
HEXAMETAPHOSFATE	72.5 LBS.

OPERATIONS SUMMARY:

All monthly drinking water laboratory tests were in compliance and the monthly report was submitted to NCDENR on January 8th, 2019. All required water samples for year 2019 were collected analyzed and have been submitted to NCDENR.

Installed new filter water sampling pump. Purchased new Turbidity meter for the plant laboratory, due to the old meter was not accurate. Prices has been obtained for the repair of the #2 Raw Water Pump and the purchase of new continuous chlorine monitoring equipment as per NCDENR requirements.

**MONTHLY STATUS REPORT OF
OPERATION FOR THE PILOT MOUNTAIN
WATER TREATMENT PLANT**

MONTH: January

YEAR: 2020

OPERATIONS: Plant operated 18 days in January.

MILLION GALLONS OF RAW WATER TREATED	9.252	DAILY AVERAGE RAW WATER TREATED (MGD)	.514
MILLION GALLONS WATER FILTERED	8.892	DAILY AVERAGE WATER FILTERED (MGD)	.494
MILLION GALLONS PUMPED TO SYSTEM	6.760	DAILY AVERAGE WATER PUMPED TO SYSTEM (MGD)	.375

CHEMICALS USED:

ALUMINUM SULFATE	1,003 LBS.
SODA ASH	1,053 LBS.
CHLORINE	194 LBS.
HEXAMETAPHOSFATE	62 LBS.

OPERATIONS SUMMARY:

All monthly drinking water laboratory tests were in compliance and the monthly report (eMOR) was submitted to NCDENR on February 6th, 2019.

**Pilot Mountain Police Department
Monthly Report for January 2020**

Accidents

1/1/2020 626 S Key St (H&R)
 1/4/2020 510 E 52 byp (H&R)
 110 W Main St (PI)
 1/22/2020 Denny St
 1/23/2020 HWY 268 @ US 52
 1/24/2020 731 S Key St
 731 S Key St
 1/28/2020 801 W Main St
 1/30/2020 647 S Key St (H&R)

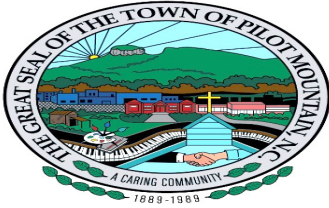
	TOTAL	AMOUNT	RECOVERED
Police Service	212		
Wrecks Investigated	9	\$ 5,600.00	
Assaults	0		
Larcenies	5	\$ 34,200.00	\$34,000.00
Disturbances/Domestic	5		
Burglar Alarms	17		
Breaking & Entering	1	\$ 500.00	
MIP & Property Damage	1	\$ 150.00	
Traffic Citations	17		
Intoxicated Drivers	2		
Intoxicated Pedestrians	1		
Forgery	1	\$ 4,037.67	
Armed Robbery	0		
Drug Charges	5		
Other Crimes	1		
Total Arrests	7		
Totals:	284	\$ 44,487.67	\$ 34,000.00

Other

1/13/2020 Served Felony WFA
 Poss of controlled substance in jail
 Poss of drug paraphernalia
 1/20/2019 Poss of Cocaine
 Poss of Schedule 4
 Poss of Drug Paraphernalia

Notes:

1/5/2020 All officers participated in the NCGHSP
 1/6/2020 Ptl Blizzard had Grand Jury
 1/1/2020 Officers regular court dates



TOWN OF PILOT MOUNTAIN

Monthly Financial Dashboard

FISCAL YEAR ENDING June 30, 2020

Reporting Period: January 1-January 31 2020

OUR CASH AND INVESTMENTS

Balances on January 31, 2020 in whole dollars

CASH & INVESTMENTS BY FUND

GENERAL FUND	January 2019	January 2020
Central Depository	\$ 471,474	\$ 590,953
NCCMT	2,108	2,326
NCCMT-Powell Bill	472	709
NCCMT-Term Account	257,890	35,485
Police Drug Forfeiture	1,398	2,195
Centura Bank CD	25,031	25,031
Fiduciary Funds	38,052	54,617
TOTAL GENERAL FUND	\$ 796,426	\$ 711,316

OTHER FUNDS

	January 2019	January 2020
Water & Sewer Fund	\$ (27,020)	\$ (36,358)
NCCMT-Water/Sewer	\$ 2,178	\$ 3,633
Water Meter CP	\$ 9,059	\$ -
Interconnection CP	\$ (27,900)	\$ 7,000
Landfill Project CIP	\$ 1,134	\$ -
Lola Lane CP	\$ 3,286	\$ 0
Water Treatment Upgrade	\$ (39,625)	\$ (275,480)
Streetscape Project	N/A	\$ 4,934
Sunset Sewer Project	\$ (66,500)	\$ (224,216)
Street Resurfacing	\$ 23,055	\$ 6,019
WWTP & Pump Stations	N/A	\$ (14,760)
AIA Project	N/A	\$ (40,612)
Capital Reserve	\$ 28,833	\$ 42,253

TOTAL OTHER FUNDS \$ (93,499) \$ (527,586)

TOTAL CASH & INVESTMENTS TOWN-WIDE

	January 2019	January 2020
ALL FUNDS	\$ 702,927	\$ 183,730

OUR CASH FLOWS...

GENERAL FUND REVENUES & EXPENDITURES	Comparison of FYTD %	
	Prior FYTD %	Current FYTD %
Fiscal Year Budget	\$ 1,858,090	\$ 1,892,090
Revenues Fiscal Year to Date	58.00%	66.00%
Expenses Fiscal Year to Date	63.38%	68.97%
WATER & SEWER ENTERPRISE FUND		
Fiscal Year Budget	\$ 935,190	\$ 906,480
Revenues Fiscal Year to Date	58.94%	58.14%
Expenses Fiscal Year to Date	62.73%	62.37%
LANDFILL REHAB PROJECT		
Project Budget	\$ 15,803	\$ 143,554
Revenues Project to Date	107.33%	112.02%
Expenses Project to Date	107.33%	112.81%
Water Treatment Upgrade Project		
Project Budget	\$ 3,978,000	\$ 3,978,000
Revenues Project to Date	0.00%	0.00%
Expenses Project to Date	0.79%	7.10%
Sunset Sewer Rehabilitation Project		
Project Budget	\$ 2,573,038	\$ 2,573,038
Revenues Project to Date	0.00%	1.72%
Expenses Project to Date	2.63%	10.63%
WATER & SEWER AIA PROJECT	NA	\$ 300,000
Project Budget		
Revenues Project to Date	0%	9%
Expenses Project to Date	0%	23%

SPECIFIC REVENUE COLLECTIONS AT A GLANCE...

	Comparison of FY %	
	Prior FY %	Current FY %
AD VALOREM PROPERTY TAX		
Fiscal Year Budget	\$ 834,280	\$ 847,090
Revenues this Month	10.25%	12.79%
Revenues FYTD	79.01%	84.04%
SALES & USE TAX		
Fiscal Year Budget	\$ 446,310	\$ 469,790
Revenues this Month	8.43%	8.58%
Revenues FYTD	59.49%	60.92%
UTILITY FRANCHISE TAX		
Fiscal Year Budget	\$ 107,000	\$ 106,020
Revenues this Month	0.00%	0.00%
Revenues FYTD	50.54%	51.53%
REFUSE COLLECTION FEES		
Fiscal Year Budget	\$ 68,000	\$ 69,840
Revenues this Month	8.64%	9.03%
Revenues FYTD	59.46%	61.76%
SALES & SERVICES		
Fiscal Year Budget	\$ 41,500	\$ 58,700
Revenues this Month	8.71%	1.79%
Revenues FYTD	64.20%	56.48%
WATER & SEWER ENTERPRISE FUND REVENUES		
Fiscal Year Budget	\$ 945,800	\$ 906,480
Revenues this Month	7.31%	7.74%
Revenues FYTD	58.94%	58.14%

EXPENDITURES AT A GLANCE...

GENERAL FUND DEPARTMENTS	Comparison of Monthly Expenses		
	Fiscal Year 2020 Budget	YTD Expenses Prior FY	YTD Expenses Current FY
Governing Body	\$ 63,280	\$ 49,791	\$ 141,706
Administration	293,760	167,166	191,448
Community & Economic D	47,500	14,554	25,702
Downtown Revitalization	125,810	63,183	90,509
Police Dept	809,630	439,862	518,098
Street Dept	104,410	95,735	71,070
Powell Bill	43,420	141,298	3,919
Sanitation	215,490	130,300	135,617
Pilot Center	19,060	17,588	11,791
Library	39,060	4,330	6,566
Debt Service	49,620	38,371	47,137
Non Departmental	-	15,447	5,548
	\$ 1,811,040	\$ 1,177,625	\$ 1,249,109
Fiscal Year Budget	\$ 1,858,090	\$ 1,858,090	\$ 1,811,040
YTD % of Annual Budget Expended		63.38%	68.97%
WATER & SEWER ENTERPRISE FUND			
General	\$ 137,720	\$ 84,150	\$ 74,858
Water/Sewer Administration	136,560	77,349	88,248
Production	218,510	131,662	126,059
WWTP	206,800	111,505	125,955
Line Maintenance	206,890	181,958	150,259
	\$ 906,480	\$ 586,624	\$ 565,379
Fiscal Year Budget	\$ 935,190	\$ 935,190	\$ 906,480
YTD % of Annual Budget Expended		62.73%	62.37%



Assessment of the Pilot Mountain Small Business Ecosystem Final Report - 12.16.2019

Summary of Engagement

The North Carolina Rural Economic Development Center (the Rural Center) has a long history of engaging and supporting small towns and their local economic development strategies and ecosystems. Recent programs include our Small Town Economic Prosperity Program (STEP), STEP for Small Business, and a number of small business lending partnerships with local governments.

In May 2018 the Rural Center launched Thread Capital, a non-profit small business lender, to consolidate its small business lending programs and better assist those facing a variety of capital challenges and needs. While any business can approach Thread Capital directly, small towns that meet certain readiness criteria can become a *Thread Capital Community* as one way to market and extend loan fund capital and support their economic development goals.

In 2019, the Town of Pilot Mountain approached the Rural Center to discuss a possible small business lending partnership and/or becoming a Thread Capital Community. The primary but not exclusive goal would be to stimulate new and more diverse economic development activity in its core downtown.

To determine the efficacy of a lending partnership, the Town engaged the Rural Center to conduct a modified assessment to better understand:

- How businesses in Pilot Mountain define success and their goals for the future.
- The perception of the Pilot Mountain ecosystem for small business, including capital, the role of the Town, business and community networks, and other challenges or opportunities for improvement.

Method

To kick off the project, in June 2019, the Rural Center visited with several staff, elected officials, and businesspeople to learn about the Town's current economic development activities and momentum, including its Main Street Program strategies. These conversations helped identify additional stakeholders for interviews and shape the questions to ask them. Over the course of three site visits in August, interviews were conducted one-on-one or in pairs at the Pilot Mountain Visitors Center or at the stakeholder's place of business or employment.

In total, the Rural Center engaged 22 individuals, including two staff, three current elected officials, two regional nonprofit directors, and a variety of downtown property owners. Many of the stakeholders are or have been actively engaged with the Town as advisory board members or event committee volunteers or have served in elected office in the past. Some own or are invested in more than one business. More than half of those interviewed were directly invested in businesses or property located on Main Street.

There were some limitations. Most of the people on the list are or have been active in civic affairs and voluntarism and thus were largely “in the know.” Several are close relations. No people of color were interviewed. And discussion of the overall ecosystem was somewhat skewed by the focus on downtown businesses and commercial properties. Stakeholders were nonetheless diverse in their interests, frame of reference, length of residency or business operations, age, family status, and place within the fabric of the community.

The complete stakeholder engagement list and interview guiding questions are attached.

Major Themes and Observations

Across the board, interview participants were engaged, thoughtful, and candid. While some perspectives varied considerably, this report lifts out the most common interview themes, categorized within six key topic areas. In addition, there are three overarching observations:

- **Pilot Mountain is well-loved.** Everyone - even those who were interviewed in Mount Airy - voiced a deep appreciation for Pilot Mountain and especially the Town’s recent efforts to spur new interest in downtown.
- **There are meaningful generational differences.** Younger stakeholders and those with small children recognize or experience challenges and opportunities in Pilot Mountain quite differently than those past retirement age. Their ambitions and visions are also different. As more young people and families are “coming back home,” navigating those differences with the long view in mind will be key for the Town.
- **Planning for resilience/transitions is lacking.** Many stakeholders perceive a lack of planning by businesses and property owners to be a threat to a thriving downtown. Property owners noted the prevalence new businesses who do not present with a business plan yet aspire to lease space. More seasoned entrepreneurs noted that it is “very hard to sell a business,” hinting at closure as their transition plan. Others observed that their properties tend to be the most underutilized. Without clear directives for disposition or utilization, heirs may show ambivalence and/or neglect, often due to family dynamics.

These observations suggest additional opportunities to engage the community about specific opportunities and barriers to small business ownership and economic development in and around downtown Pilot Mountain. Six topical themes follow.

1. Economic and Personal Visions for Business

We asked stakeholders about their personal and economic vision for their business or real estate interests (as applicable) to better understand whether growth, expansion or diversification was in their future. Two key goals were shared by stakeholders almost unanimously:

- To contribute to a thriving town.
- To achieve or maintain business sustainability for personal or family self-sufficiency.

Almost none of the business owners we spoke with were interested in *growing* their current line of business significantly, although a few have ideas or nascent plans for opening new businesses or repositioning their current business. Facing life changes, one business owner said her goals are changing “now that the business will be my primary income.” Another planned to downsize his family’s portfolio of businesses to better fit their goals and needs. Property owners/developers were more likely to have active plans for growth, undertaking renovations or other projects to accommodate future business growth in downtown, including potentially their own business ideas.

2. Perception of Town Government

We asked stakeholders about business drivers and conditions that help small businesses in Pilot Mountain succeed, with an eye toward what the Town is doing well or could do better to support this ecosystem. In general, stakeholders believe that the Town has a strong staff and elected leadership that actively demonstrate support for local business. Specifically, they:

- Praised **staff responsiveness** to concerns related to “getting open,” such as facilitating infrastructure needs, but noted that the town is lacking around “how to get the word out about what other resources are available.”
- Noted the energy that staff, key committee chairs and volunteers have brought to **Main Street initiatives**, including the continuous improvement of long running events (May Fest, Vintage Market) and the addition of new ones. Dino Days was an especially big hit.
- Had **mixed opinions** on the frequency and economic benefits of Cruise-Ins.

“It’s important that the business owners see that the Town is invested,” said one stakeholder, “but not so invested that they take over.” Many stakeholders mentioned resistance to change in town that has been dissipating with a more forward-thinking board. However, there was

consistent reference to “insiders” and a perception that they “quietly block change” and/or benefit most from Town policies, specifically long-time Pilot Mountain property owners that have been active within Town government. While this is a common dynamic in small towns, it is relevant as the Town develops its public and business engagement and messaging strategies, and as it makes the case for additional change.

3. Commercial and Residential Real Estate

Three concerns surfaced consistently:

- **Speculation about but no answers for empty buildings.** There is shared frustration with empty or underutilized commercial properties downtown, but stakeholders had different ideas and perceptions about the motivations, attitudes, and responsibilities of those who own them. Some said owners “don’t want anyone else to have it” or “don’t need the money,” while others have empathy for heirs who are “overwhelmed” or have complicated family dynamics. Similarly, there was no consensus on solutions.
- **Mismatched pricing in commercial real estate.** Businesses, including Realtors, consistently complained that commercial leasing rates and/or sales prices downtown have been disproportionate to the value and state of repair of the buildings, accounting for some persistent vacancies and failure rates of new businesses. Construction and upfit costs are high and getting more so, and not very many landlords are flexible on price or rent reductions during upfit periods. One stakeholder went as far to say that some property owners “inflate their rents to keep their building vacant.” The more common wisdom among owners is “the more you charge, the better renters you can get,” but many stakeholders say this hurts opportunities for local business ownership and business diversity downtown.
- **Interest in/concern for housing.** Many stakeholders highlighted residential density as an important component of a healthy ecosystem for small businesses. Creating new homeownership and rental housing opportunities in town or the ETJ, but especially in or near downtown, was high on their lists of needs and wants. So was housing priced in the \$200,000 range.

4. Capital

We asked businesses to tell us about their personal experiences financing their businesses and/or whether access to capital is a critical barrier to business ownership or growth in Pilot Mountain. Key takeaways:

- **Aversion to debt.** First, while some business owners had secured traditional loans or credit cards in their start-up years or as a means of working capital, nearly everyone we

|

spoke with had a clear aversion to debt, preferring to operate out of personal savings, cash flow, or support from “friends and family.” (One described borrowing \$400 from a friend but refusing to use the equipment she purchased until the loan was repaid in full.) While bootstrapping strategies also carry risk, they are far more acceptable to stakeholders than dealing with traditional loans.

- **Demand is unclear, but debt capital is available in various forms.** Stakeholders had little direct or indirect knowledge of current unmet capital needs, except in circumstances where a business owner has compromised credit. Personal, unsecured credit cards were the most frequently cited debt resource, described as the easiest to secure and the most flexible to manage. One business takes advantage of Square Capital’s microloan product, which is offered to qualified Square sellers. When asked where small businesses might find traditional business loans, stakeholders mentioned local lenders Carolina Farm Credit and Surry Bank, and also the Rural Center. Several noted, however, that while debt capital is available to those with good credit, the lending environment has changed significantly from the days of relationship lending. As a result, one business owner who used local lender for a building years ago speculated he would not be able to get a similar kind of loan now.
- **Need for reliable income and benefits.** Many we spoke with said the biggest barrier to taking the plunge as a business owner is the need for a second, steady income and, especially for those with children, medical insurance. Two stakeholders described the difficulties they faced when they lost at least one of those resources due to a major change in family circumstances. As a result, one is carrying more debt than they would like, and another is considering whether they should close or suspend their business and secure a “regular job” instead.

This last point is affirmed in a different way by landlords, who have witnessed a recurring mistake among aspiring retailers and restaurants in particular: using the proceeds of their business to sustain their family rather than reinvesting in the business. This cycle of undercapitalization can quickly lead to slow growth or failure, affecting family sustainability as well.

5. Small Business Skills and Support Systems

“Capital is part of the puzzle, but it’s not the only thing that makes for success,” said one stakeholder, citing management of overhead and personnel as important pieces of the puzzle. Another agreed, saying aspiring business owners need “more training, research, vetting and careful consideration for what it means to be in business.”

Like these stakeholders, many others strongly suggested that some small businesses in Pilot Mountain lack savviness and skills in basic operations, marketing, and business-to-business (B2B) opportunities that could increase their revenues and success rates. Yet they also had mixed reviews of the organized resources available to assist, including the Surry Community College Small Business Center, the now-defunct Pilot Mountain Merchants' Association, and even business resources available from the Town itself.

One of the most important resources for small businesses in Pilot Mountain currently is **peer-to-peer support**, which according to stakeholders is given freely to trusted actors and those who feel comfortable asking for help and advice. Property owners seemed somewhat more close-to-the-chest as a peer group but were willing to advise and assist tenants facing specific needs.

Similarly, there is a renewed sense of optimism about a peer networking structure with the emergence of the **Pilot Mountain Business Council**, sponsored by the Greater Mount Airy Chamber of Commerce. Randy Collins, President and CEO, was among those interviewed and acknowledged past “burned bridges” between the Chamber and Pilot Mountain leaders. He also expressed optimism but stressed the importance of engaging the more than 250 businesses in and around Pilot Mountain – not just downtown businesses – to inform the Town’s economic development activities and leverage and strengthen B2B relationships in particular. “Programs will be better received from the Business Council rather than the Town,” said one stakeholder. “The business council will be ‘heard’ differently.”

6. Business Diversification

“Pilot Mountain can cut your hair and save your soul,” said one stakeholder, a theme we also heard from the Town’s staff and Board leadership. To explore business diversification, we asked every stakeholder **what kinds of businesses or activities they would like to see downtown** or elsewhere in town that could attract new visitors or keep more local money circulating in the community. Common responses:

- More and more diverse restaurants, including family-friendly and “fancy” ones.
- Restaurants and other venues that host live music and entertainment.
- Local food system businesses: farm-to-table restaurants, local fresh food market, retail space for small producers and value-add products.
- Tap room or brewery.
- Outfitters and other businesses that could attract visitors to Pilot Mountain State Park.
- “Businesses that matter” to families and will attract full-time residents downtown.
- Makers space and/or local arts/crafts vendors or shared space.

We also asked stakeholders about **features of the ecosystem that the Town could help** facilitate to attract or support new business ownership. Common responses:

- Preference for small grants rather than loans for start-up purposes.

- Increase incentives to participate in façade improvement program.
- Catalyze historic designations for commercial and residential properties and help leverage Historic Preservation Tax Credit opportunities for downtown commercial properties.
- Encourage/support residential units downtown, including second level housing above retail and restaurant spaces.

Improving the Small Business Ecosystem: Recommendations for the Town

The Town of Pilot Mountain is actively investing in Main Street Program strategies and other initiatives that are clearly making a positive difference downtown. Based on our interviews and the key themes outlined above, the Rural Center recommends four additional measures the Town could undertake independently or with partners to improve the small business ecosystem. The first three are relatively low-cost, but given the limitations of our community engagement exercise, the fourth might need additional vetting and ideating from community and business stakeholders before investing significant staff time and resources.

1. Continue to refine and invest in the Town’s tested Main Street strategies.

- Strengthen, but do not add to, the menu of annual downtown events.
 - Continue to increase the quality and participation rates of newer, family-oriented events such as Dino Days.
 - Ensure all events provide maximum opportunities for local vendors, crafters, and musicians to participate on the street or inside local businesses.
 - Partner with the Pilot Mountain Business Council to create in-store promotional tie-ins with local businesses both in and outside of downtown.
- To bring more foot traffic directly into stores, experiment with annual or seasonal promotion opportunities, perhaps in partnership with the Business Council or TDA (e.g. local “passport” program, sidewalk sales, coupon days.)
- Be inclusive of and generate increased attention on “hidden businesses” that contribute to economic diversity and vitality (e.g.: the sock factory, service businesses, value-added operations in the incubator, etc.)

2. Build and maintain a positive relationship with the Greater Mt. Airy Chamber of Commerce and demonstrate active support for the Pilot Mountain Business Council.

- Encourage membership throughout town and the ETJ.
- Take advantage of the Chamber’s messaging capabilities to market Town-sponsored events, small business resources, and Board of Commissioner agenda items that are relevant to small business.
- Co-sponsor one or more annual events for local and aspiring businesses (i.e.: an annual breakfast and awards program).

- Strengthen relationships between businesses outside of the core downtown and connect them with downtown activities and town-wide promotions.

3. Improve the quality of informational resources the Town makes available for small business.

- Revamp the Town’s website “Business” section - fix broken links, update and add to resource lists, and add easy to find step-by step guides and checklists for new businesses and commercial property owners. Check out [Chatham County’s business page](#) for one approach to a business development checklist.
- Coordinate with the County to offer a step-by-step guide and one stop pre-permitting meeting between town and county staff and the business owner to create a wrap-around feel to the business startup process. Chatham County offers such a model [here](#).
- Design a “Doing Business in Pilot Mountain” workshop with the Surry County Small Business Center and/or a video mini-series that can be easily shared on social media.

4. Create a “go local” value proposition and branding strategy to drive business promotions and collaborative strategies.

- Intentionally collaborate with local food, art, crafts, brews, wine, and family entertainment entrepreneurs to develop a value proposition and branding strategy to retain local dollars and attract new visitors.
- Create a #LocalPilot (for example) hashtag and encourage Town and County Commissioners, Advisory Board members, and other local “influencers” on social media to document and broadcast their visits to local businesses.
- Create window stickers for local businesses, bumper stickers for local residents, and “open source” advertising collateral for businesses who sign on to the campaign.
- Consider a small grant program or capital subsidy for emerging business ideas for makers spaces, art/crafts collaborative vendor space, commercial kitchen expansion, local food system networks, etc. The City of Marion, for example, partners with the Marion Business Association, McDowell Chamber of Commerce, and the McDowell Economic Development Association to offer the Growing Entrepreneurs Marion [Growing Entrepreneurs Marion \(GEM\) program](#), an eight-week program for entrepreneurs that includes a competition for a \$5,000 grant to assist in locating in downtown Marion. The City also partnered with the Association, Chamber, and the County to expand its façade improvement grants to include free design assistance and up to 100% of certain costs.
- For some additional examples, see [Asheville Grown Business Alliance](#), which sponsors a Go Local Card, Go Local Week and Love Asheville brand, and [High Country Local First](#), which supports local businesses and farms in a variety of ways, including a rewards card.

Any combination of the above measures would offer added momentum for local business development and property rehabilitation/utilization rates, and for driving more local residents and visitors downtown.

How the Rural Center Can Help

Our assessment did not find significant demand for the kind of small business lending offered by Thread Capital, the Rural Center’s lending subsidiary. However, with additional investments by the Town and its partners, we do see a potential for increasing need and demand from start-up or growth-phase businesses. As such, the Rural Center would be pleased to support the Town of Pilot Mountain in two ways as it continues its efforts to strengthen the small business ecosystem:

1. Designate Pilot Mountain as a Thread Capital Community.

- Launch a Small Business Loan Fund with the Town targeted to Pilot Mountain businesses both within and outside the City limits, coordinating closely with the Surry County Chamber of Commerce. See sample MOU, attached, which outlines roles and responsibilities of the partners, loan guidelines, costs and more.
- For even greater effect, there is an opportunity to facilitate a larger, coordinated effort with the County and other municipalities. The Town of Elkin, for example, has also participated in such a partnership with the Rural Center in the past and will be considering continuing on as a Thread Capital Community. We would welcome the opportunity to discuss what a more coordinated effort could look like.
- Explore ways that Thread Capital products could be used for upfit/capital improvements that are attractive to both property owners and start-up businesses—for example, cost sharing models. We would suggest starting this exploration by designing and co-hosting a seminar or roundtable discussion with Main Street property owners and select contractors and small businesses.
- Educate area lenders and the Pilot Mountain Business Council about Thread Capital’s products and offer our partnership to increase business education and resources to commercial real estate and small business borrowers.
- Provide communications materials and templates to help the Town build momentum and promote the partnership, with some targeting toward local food, crafts, art, value-add and other producers and vendors that support the “go local” value proposition.

2. Leverage additional Rural Center resources to strengthen the small business ecosystem.

- Through the Town and the Pilot Mountain Business Council, encourage participation of Pilot Mountain business and advisory board leaders in the Rural Center’s Rural Economic Development Institute (REDI) and other leadership resources.
- Through its soon-to-launch entrepreneur-focused advocacy initiative, the Rural Center will be able to offer pathways for Town leadership to participate in regional and

statewide conversations, and to amplify the voices of their local small business owners in ongoing policy discussions.

In short, the Rural Center sees significant opportunity to strengthen the small business ecosystem by building on the good work the Town already has done to encourage positive change downtown and elsewhere. The ideas presented here are consistent with the initial conversations between Rural Center staff and the Town, but we welcome additional ideas and dialogue about the best ways to leverage our mutual resources for the benefit of a more vibrant, entrepreneurial, local economy. We suggest as a starting point a meeting with Rural Center staff, the Town Manager, and any or all Commissioners and/or Town advisory board members as determined by the Town.

Please see the following Appendices for additional information:

1. Stakeholder Interviews Guiding Questions (p. 11)
2. Assessment Participants (p. 13)
3. Sample MOU (p. 14)

Appendix 1: Business Assessment Interview Questions

Interview Objectives:

- Better understand how businesses in Pilot Mountain define success and their goals for the future.
- Understand the perception of the Pilot Mountain ecosystem for small business, including capital, the role of the Town, business and community networks, and other challenges or opportunities for improvement.

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1. Tell me about your businesses [or real estate investments] in Pilot Mountain. When and why did you choose to invest here rather than elsewhere in Surry County?
 2. How many jobs [or people in your family] does your business currently support, and is that more or less than three years ago?
 3. In general terms, what is your economic and personal vision for your business [or real estate interests] and how do you evaluate whether you are getting there?
 4. Is either business [or investment] growth, expansion or diversification included in your goals? If so, tell me more about that. If not, why not? [See chart below for examples]
 5. Think about economic, demographic, seasonal, local and social media, or other conditions that help you succeed. What are the strongest drivers of your business? Are there any business drivers that you wish were stronger, more available, or more sophisticated in Pilot Mountain? [e.g. business capital, B2B networks, workforce, concentration of certain businesses or special populations, technical assistance, space, etc]
 6. Capital can be a big barrier to new businesses or for business expansion. Has access to capital ever been a challenge to you and/or other businesses/investors that you know? Are the challenges related to the availability of appropriate lenders, lending requirements and process, cost of capital, credit criteria, or something else?
 7. You know it takes a willingness to accept risk to start or grow a new business [or to invest in commercial real estate]. How would you characterize the general tolerance for risk among current owners/investors in Pilot Mountain?
 8. Do you think people have a positive, negative or neutral attitude towards entrepreneurship and small business ownership in town? Where or how might we find those with entrepreneurial spirit and skill in town who haven't already emerged?
 9. What is the Town doing well, and what could it do better, to encourage local business start-ups and expansion, especially business diversification downtown? Are there barriers to participation

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in economic and business development activities that the Town could help reduce for small business owners? What's missing in Pilot Mountain?

10. One barrier we have heard about is the lack of available, well-renovated space for both first-floor and second floor business in and around downtown. What's your perception of the vacancy issue and capital improvement needs in town? What might encourage property owners to act? [e.g. code enforcement, façade grants]
11. Finally, do you have a resiliency plan and/or transition plan for your business [or properties]? If not, are you beginning to think about this? Are there any barriers to creating or executing resiliency plans or transition plans for owners like you [e.g: concern about financial resources, tax implications, unclear where to go for help for the paperwork, unclear who the related or unrelated 'heirs' to a business could be]. In general, should transition planning be a concern for business owners, property owners, or the Town itself?

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Appendix 2: Assessment Participants

Town Representatives:

Evan Cockerham, Mayor
Kim Quinn, Vice Mayor
Scott Needham, Town Commissioner
Michael Boaz, Town Manager
Jenny Kindy, Main Street Coordinator

Other Business and/or Property Owners:

Les Bennett, Pruitt Insurance Agency and co-owner, childcare center
Diane Blakemore, Founder of Walk Pilot Tours; Massage Therapist; Past member of TDA.
Susie Candelaria, Blue Mountain Herbs and Supplements
Randy Collins, Greater Mount Airy Chamber of Commerce
Christy Craig, Vintage View, Chair, TDA
Michelle Fallin, Realtor, Main Street resident, and President of the Civic Club
Niki Farrington, Niki's Pickles
Josie Grogan, Artist, volunteer, organizer of Fairy Door Trail
Laura Hardy, Art & Vine, graphic designer
Tanya Jones, Surry County Arts Council
Chris Lawing, Property owner/developer/contractor
Pam Morgan, Nationwide Insurance
Donald Mueller, Restaurateur
Kelly Mueller, Property owner, aspiring small producer/local foods entrepreneur
Linda Needham, Property owner
Robbie Sutton, Realtor
Sue Stone, Property owner

Appendix 3: Sample Memorandum of Understanding

Memorandum of Understanding

Between

(City/Town)

and

Thread Capital, Inc.

(a subsidiary of the Rural Economic Development Center, Inc.)

As of (Date)

Background

Thread Capital is offering a locally branded “Thread Communities” revolving loan fund to select communities who have submitted a compelling request, invested in an assessment of their community’s entrepreneurial ecosystem, and demonstrated a capacity for entrepreneurial development in their community.

Purpose

This Memorandum of Understanding (MOU) sets forth the guidelines and understanding between the (City/Town) and Thread Capital related to the establishment, operation, and use of a locally branded “Thread Communities” revolving loan fund.

Roles and Responsibilities

Thread Capital will:

- Provide locally branded physical and digital marketing materials, guidelines, and an online application for the local loan fund.
- Collaborate with (City/Town) on a press release and local media placement, if desired.
- Assign one staff member as the main point of contact for (City/Town).
- Review, underwrite, fund, and service all loans. The Thread Communities Handbook outlines additional details of the loan process.

(City/Town) will:

- Actively promote the local loan fund to small businesses in (City/Town), including a link to the application on the town’s resource page for small businesses.
- Create an environment that facilitates the successful start-up or expansion of small businesses.
- Respond to inquiries from Thread Capital regarding application questions as needed.

Eligibility

Funds must be used to start or expand a small business within (City/Town). Individual business eligibility will be in accordance with Thread Capital policies. Basic lending criteria are as follows:

- Borrower must be 18 years of age.

- Business must be for-profit and based in N.C.
- Business should not be involved in adult entertainment, multi-level marketing, real estate speculation, lending, or gambling.
- Borrower should have no unsettled public judgment, bankruptcy, delinquent taxes, or delinquent student loans unless they are on an active payment plan.
- Anyone who owns 20 percent or more of the business must sign on the loan.

Thread Capital does not discriminate on the basis of race, color, religion, national origin, ethnicity, gender identity, sex, sexual orientation, veteran status, military obligation, marital status, ability, or age. All Thread Communities are expected to avoid discrimination of any kind and be representative of the organizational values of Thread Capital and the Community.

Funding

Thread Capital will allocate up to \$200,000 of its funds to capitalize a revolving loan fund for (City/Town). If local demand for small business loans exceeds the determined amount (up to \$200,000), communities may draw down additional funds based on availability and performance.

An individual loan will range from \$500 to \$50,000. The maximum loan term is six years. Thread Capital will process, review, underwrite and make final decisions on all loan applications according to Thread Capital policies. These policies, developed and refined over 30 years, are designed to maximize the reach of Thread's loan products while not undercapitalizing business owners. In recognition that (City/Town) may wish to appeal a credit decision made by Thread Capital, (City/Town) has the option to offer collateral to secure the loan in the form of a cash account at up to 100 percent of the principal value of the loan.

The loan fund is designed to serve as gap funding or complementary financing for small businesses and is not to compete with banks or other reputable lenders.

Duration

Thread Capital reserves the right to discontinue or reduce funding allocated to the revolving loan fund in the case of any of the following conditions: 1) No loans are made from the fund within 12 months of the execution of this memorandum; 2) After initial 12 months, utilization of loan principal is under 50% for a period of 12 consecutive months; or 3) a violation of Thread Capital loan policies or nondiscrimination policies.

Compensation

In exchange for these services (City/Town) will make a \$5,000 annual payment to Thread Capital, Inc. Thread will invoice (City/Town) one time per year, in advance, for the life of the program.

Primary Contact Information

Unless otherwise specified, future communication regarding the revolving loan fund will be directed towards:

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(City/Town):

Local Partner Name

Position

Address Line 1

Address Line 2

Telephone

Email

Thread Capital:

[contact name TBD]

Thread Capital

4021 Carya Dr.

Raleigh, NC 27610

919-212-4950

Agreed To:

For (City/Town)

For Thread Capital, Inc.

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