



Town of Archer Lodge

AGENDA

Regular Council Meeting

Monday, August 4, 2025 @ 6:30 PM

Jeffrey D. Barnes Council Chambers

NCGS § 143-318.17. Disruptions of official meetings.

A person who willfully interrupts, disturbs, or disrupts an official meeting and who, upon being directed to leave the meeting by the presiding officer, willfully refuses to leave the meeting is guilty of a Class 2 misdemeanor.

Page

1. WELCOME/CALL TO ORDER:

- 1.a. Invocation
- 1.b. Pledge of Allegiance

2. APPROVAL OF AGENDA:

3. CONSENT AGENDA:

- 4 - 887 3.a. Approval of Minutes
 - 06 May 2024 Regular Meeting Minutes
 - 20 May 2024 Work Session Minutes
 - 30 May 2024 Special Meeting Minutes
 - 03 Jun 2024 Regular Meeting Minutes
 - 24 Jun 2024 Special Meeting Minutes
 - 19 Aug 2024 Special Meeting Minutes
 - 09 Sep 2024 Regular Meeting Minutes
 - 23 Sep 2024 Work Session Minutes
 - 07 Oct 2024 Regular Meeting Minutes
 - 21 Oct 2024 Work Session Minutes
 - 04 Nov 2024 Regular Meeting Minutes
 - 18 Nov 2024 Work Session Minutes
 - 02 Dec 2024 Regular Meeting Minutes
 - 06 Jan 2025 Regular Meeting Minutes
 - 29 Jan 2025 Budget Planning Retreat Minutes

03 Feb 2025 Regular Meeting Minutes
17 Feb 2025 Special Meeting Minutes
17 Feb 2025 Budget Planning Retreat Minutes
21 Apr 2025 Work Session Minutes
28 Apr 2025 Special Meeting Minutes
19 May 2025 Work Session Minutes
19 May 2025 Special Meeting Minutes
09 Jun 2025 Work Session Minutes
30 Jun 2025 Special Meeting Minutes
14 Jul 2025 Regular Meeting Minutes
[Regular Council - Monday, 06 May 2024 - Minutes - Pdf](#)
[Work Session - 20 May 2024 - Minutes - Pdf](#)
[Special Meeting - Thursday, 30 May 2024 - Minutes - Pdf](#)
[Regular Council - Monday, 03 Jun 2024 - Minutes - Pdf](#)
[Special Meeting - Monday, 24 Jun 2024 - Minutes - Pdf](#)
[Special Meeting - Monday, 19 Aug 2024 - Minutes - Pdf](#)
[Regular Council - Monday, 09 Sep 2024 - Minutes - Pdf](#)
[Work Session - Monday, 23 Sep 2024 - Minutes - Pdf](#)
[Regular Council - Monday, 07 Oct 2024 - Minutes - Pdf](#)
[Work Session - Monday, 21 Oct 2024 - Minutes - Pdf](#)
[Regular Council - Monday, 04 Nov 2024 - Minutes - Pdf](#)
[Work Session - Monday, 18 Nov 2024 - Minutes - Pdf](#)
[Regular Council - Monday, 02 Dec 2024 - Minutes - Pdf](#)
[Regular Council - Monday, 06 Jan 2025 - Minutes - Pdf](#)
[Budget Planning Retreat - Wednesday, 29 Jan 2025 - Minutes - Pdf](#)
[Regular Council - Monday, 03 Feb 2025 - Minutes - Pdf](#)
[Special Meeting - Monday, 17 Feb 2025 - Minutes - Pdf](#)
[Budget Planning Retreat Continued/Work Session - Monday, 17 Feb 2025 - Minutes - Pdf](#)
[Work Session - Monday, 21 Apr 2025 - Minutes - Pdf](#)
[Special Meeting - Monday, 28 Apr 2025 - Minutes - Pdf](#)
[Special Meeting - Monday, 19 May 2025 - Minutes - Pdf](#)
[Work Session - Monday, 19 May 2025 - Minutes - Pdf](#)
[Work Session - Monday, 09 Jun 2025 - Minutes - Pdf](#)
[Special Meeting - Monday, 30 Jun 2025 - Minutes - Pdf](#)
[Regular Council - Monday, 14 Jul 2025 - Minutes - Pdf](#)

4. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

5. DISCUSSION AND POSSIBLE ACTION ITEMS:

- 888 - 1129 5.a. Discussion and Possible Action on a Resolution, #AL2025-08-04, Approving Local Record Retention and Disposition Schedules
[Resolution Approving Local Record Retention and Disposition Schedules - PDF](#)
[Local General Standards Schedule - PDF](#)
[Local Program Standards Schedule - PDF](#)
- 1130 - 1137 5.b. Discussion and Possible Action on Filling a Vacancy on the Planning Board
[Christopher J. Deaderick Application](#)
[Melissa S. McCormick Application](#)
[Russ Austin Application](#)
[Joe G. Creech Application](#)
[Spencer Lane Application](#)

6. TOWN ATTORNEY'S REPORT:

7. TOWN ADMINISTRATOR'S REPORT:

- 7.a. Town Administrator's Report
- 7.b. Park and Recreation Director's Report
- Construction in phase 2 continues with irrigation and restroom looking to be complete soon.
 - Fall sports registration has closed.
 - Winter program planning has begun.

8. MAYOR'S REPORT:

9. COUNCIL MEMBERS' REMARKS:

10. CLOSED SESSION § 143-318.11

11. ADJOURNMENT:



**Regular Council - Minutes
Monday, May 6, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Purvis
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None
Page

MEDIA PRESENT:

None

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mullholem called the meeting to order at 6:30 p.m. in the Jeffrey D. Banned Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance of the US Flag.

2. APPROVAL OF AGENDA:

a) No changes or additions.

Moved by: Council Member Wilson
Seconded by: Council Member Purvis

Approved the Agenda

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

a) No public comments.

4. PLANNING/ZONING REPORT:

a) Introduction of New Town Planner ~ Mr. Jason Kress

Town Administrator, Bryan Chadwick, introduced Jason Kress as the new Town Planner. Mr. Chadwick welcomed Jason to the team. Ms. Jenny Martin

and Mr. Chadwick expressed their gratitude to Brandon for his help acclimating Jason to his new position.

b) Planning/Zoning Update

Brandon Emory, Interim Town Planner, gave a quick report letting all in attendance know that planning and zoning is going well. He expressed his gratitude for the opportunity to work with the Town and to assist with getting Mr. Kress acclimated to his new position.

c) Code Enforcement Monthly Report

Mr. Rodney Barbour gave an overview of the code enforcement April monthly report.

5. VIRTUAL PRESENTATION:

a) Audit Presentation for Fiscal Year Ending June 30, 2023 ~ Mr. Dale Place of May & Place, PA

Mr. Dale Place explained the Audit for Fiscal Year Ending June 30, 2023. He expressed that the Town is doing an amazing job. Mayor Mulhollem thanked the Staff and Mr. Place for putting the audit together.

14 - 41

b) 2024 Comprehensive Land Use Plan Update ~ Chad Meadows

Chad Meadows explained survey results with a power point presentation attached below. He expressed his gratitude for the Council to allow him to present remotely. Discussion followed. Mr. Meadows explained potential additions that increase the walk-ability and commercial (retail/services) aspects of the Town. He explained that adding the recreational aspects of the Town is moving in the right direction. Discussion followed - regarding sewer and storm water, the potential need for an ETJ, resolving issues with traffic and control of congestion, and the idea of a Town Center and the limitations and benefits of something like that for the Town.

[Archer Lodge Comp Plan Survey Report 5-6-24](#)

6. PUBLIC HEARINGS, DISCUSSION AND POSSIBLE ACTION ITEMS:

a) PUBLIC HEARING - Special Use Permit Application for PID 178002-78-6179 for Approval of a Radio Cell Tower

Mayor Mulhollem presented that there may have been a conflict of interest due to his relation to the owner of the property. This has been disclosed to Town Administrator and Town Attorney. It was agreed upon that Attorney Marcus Burrell is to preside over the hearing.

1. Town Attorney - Swore in Witnesses, including staff, who intend to Present Evidence

- Attorney Burrell sworn in all applicable parties present.

2.If applicant was represented by anyone other than a licensed attorney, the applicant shall request the consent of the Town Council

- Attorney Burrell asked if the Applicant had any representation other than a licensed attorney. There was none.

3. Attorney Burrell asked the Town Council Members to disclose the following for the specific purpose of this application:

- Any site visits.
- Ex parte communications.
- Specialize knowledge they have relevant to the case.
- Fixed opinion that is not susceptible to change based on what they learn.
- Conflict of Interest.
- Financial interest; and

- **Any other information relevant to determining whether a conflict of interest**
- **Town Council to vote on recusal of member if any conflict exists.**
- **Note: The applicant or other affected persons may present any objections regarding a member's participation.**
 - **The following items were disclosed:**
 - Council Member Bruton had requested the address from Bryan Chadwick, Town Administrator, and in turn looked up the address on GIS to see the property. Council did not find this to be an issue.

4. Attorney Burrell Opened the Quasi-Judicial Public Hearing.

5. Brandon Emory presented the Staff Report as follows: (Transcribed)

Brandon Emory: So, what we've got is an issue here in a town where a lot of people's cell phones do not work well. So what that means is we have cell providers who want to provide cellular service and for that and with that comes cell towers. The proposed location does not have a physical address but it is directly next to 7217 Covered Bridge Road and directly across from 7152 Covered Bridge Road. The zoning district for this is AR which is Agriculture Residential but directly across the street from where it will be or where it's being proposed is a CB Commercial Business. There is also a tract of land that is an easement for a utility driveway going through. Proceeding this, it did not per our UDO it did not have to go in front of Planning Board but we did go through the proper process of providing notice of public hearing. It was sent to anyone in the effected area of pretty much 100 feet of where it would be, attached to or across the street. All of those individuals were notified. I did receive one inquiry via email, it was just simply asking what was the specific location of it so I know if it was going to effect me. I sent them a response and did not receive any additional responses from them. In the application what we've got is our application identifies the six questions and what I want to do is provide you kind of the information that was provided to me through that application. And then they have provided a very well put together packet. I believe they will present the same information to you but if there is anything that is not covered I can go though afterwards if we need to. The first thing that is listed is that it will not materially endanger the public health, safety. What they have provided in the application is that the requested facility is strategically placed on avoided property that will allow for Verizon Wireless to provide central coverage for the surrounding area. Public safety and health of the area will be enhanced as the proposed facility will provide effective access to 911 first responders, fire, police, and EMS. The second is that it complies with standards, conditions, and specifications of UDO. Part 5, user regulations aren't specific on the standards. The proposed facility is going to comply with all standards, conditions, and specifications of the UDO. They've attached in detail I'm sure they are going to go through each of those and the plans as well. The third is will not substantially injure the value of abutting land as well and it's special use as a public necessity. They stated, the proposed facility will not injure the value of the abutting land and many people deem the Verizon Wireless structure to be a public necessity. They included an impact study as well and I am sure they will cover that. If they don't I should have it in this packet. Will be in harmony with the area in which it is located. With a careful placement on a six acre property the proposed facility will be in harmony with the area and certainly with the area effected with wireless infrastructure. This is generally is in general is in line with the town municipality policy guidance. The proposed facility is in general the forming of the town's policy guidance with its location on the property and provisions of the central part of the services and surrounding area. Seeks the town's approval for the ability to provide adequate public facilities which would be fire, rescue, and utilities. Proposed facility does not require any public facilities other than fire and law. So that was what was included in the packet. We also have a signature page from the property owner supporting this application on their behalf. Just a couple things in the packet that we've got. I've got three of these incase there is anything that we don't have that you need to see. The first thing that they have which kind of came up a lot, this is from the Federal Aviation

Administration. Determination of no hazard to air navigation. This is assuming they fall under these specific conditions that they have outlined. If they do not follow those that wouldn't. But, at this time based on the plans that were presented the determination is no hazard to air navigation. So meaning, planes and aircraft flying over, its not too tall to interfere with anything. They provided a statement to the effect that being in course with their UDO that TowerCom and its successors and assigns by this declaring itself, its successors, and assigns of being financially responsible to assure the proposed communications tower will be dismantled and removed within 30 days following 180 days of succession of use. So, once it's stopped using a lot of time a lot issues that you run into with special use permits and projects is that they will sometimes only exist for a certain amount of time and the issue or concern is what's gonna happen 30 years, 40 years, 50 years from now if they're not working or not in business or something. What they're doing is they're assuring that it will be dismantled once it's not in operation for 180 days and dismantled within 30 days of that. That's what that is for and that's what is current for what our ordinance requires. They also have a second form included which I'm sure they'll have as a false replication letter. The proposed metropole construction will be 195 feet according to this with it falling it would fall within a radius of 125 feet. It's not designed to collapse, but its got stronger supports at the bottom which would make it more difficult to break. So if a large storm were to come by you wouldn't have to worry about 200 feet falling of tower it would be collapsing in on itself for a radius of 125 feet. They also included a study done through Verizon basically showing where they want to be at, where they want to provide service at and this location is pretty much right in the center of where that desired service area is for them. The tower I believe will support three carriers. The only one listed in the application is Verizon. But that should include everything that I've got at this particular moment. If you have any questions on specifics I would love to address those and if you need me to come back up anytime I'm willing to do that as well.

Council Member Wilson: I have a question with regards to the FAA.

Brandon Emory: Yes.

Council Member Wilson: Was that decision made locally by FAA navigational people or was that made long distance.

Brandon Emory: So I'm sure that the applicant would be able to provide some additional detail. The letterhead on here was the Federal Aviation Administration South West Regional Office Construction Evaluation Group out of Fort Worth Texas. That is what is listed on this particular page as a letterhead.

Council Member Wilson: Alright and you said that the height tower was what? 195 feet?

Brandon Emory: Yes

Council Member Wilson: And that has no impact regarding approach procedures to the airport?

Brandon Emory: No, it was determined that this would have no hazards in navigation. They would take all that into effect and into account and again it's based on what the applicant has presented mocks of the tower as it is not has been erected and you can't physically look at it and measure. But based ff what was presented to them as long then as nothing changed from that then the determination of no hazard clear navigation was made. It is the determination that doesn't expire until 5/16/25 and again if nothing changes and again, I feel like they will comply with this condition of no hazard. But if they change anything from what they presented then its void and they will have to get it reevaluated. But based off of what they provided, their plans, and everything else there is no hazard to air navigation.

Council Member Wilson: So it won't change anything to the approach procedures to the airport?

Brandon Emory: No sir it will not.

Council Member Wilson: Okay.

It's high enough to be effective for cell service but low enough to not impact anything that's in the air.

Council Member Bruton: Brandon you mentioned that notices were sent out about what's happening. Was there a balloon flown at that 195 foot so that people can actually see what it's going to look like? I know in the past when

a tower has been proposed they actually had actually flown a balloon at that say 195 foot.

Brandon Emory: No I'm not aware of a balloon that was flown there. I will say that in regard to the previous tower discussion. This one is not as much in the middle of the town as what that one was. So, this one you know there was nothing that I was aware of. It's not something that's outlined in our UDOs. So, you know, I'm sure that if we requested it, I'm sure they would comply. But as of right now there's really nothing on that written.

Council Member Bruton: Alright, I guess my other question is you said the removal 180 days after non use. Will that include any hazardous material? I know when we were talking about possibly putting a tower at the park there was some conversation about batteries and things under ground that could possibly leak hazardous material.

Brandon Emory: I would prefer that question to the applicant as they can provide more details. But what that would mean based off what I have read and the UDO requires is that the ground would be returned back to as close to it's original status it was prior to the tower being erected. So they would have to remove everything.

Mayor Pro Tem Castleberry: From the sounds of what you said to me it appears that it complies with pretty much all of our restrictions.

Brandon Emory: Yes, with everything that I have looked at on there it appears to comply with that. They included a copy of the UDO regulations with their packet. It was very detailed. It was very easy to read and understand. I've got three of them here if any of you would like to take a look at it. But, it appears to be in compliance with the UDO. They went through, I've been in discussion with Mr. Yates for quite a while. So this is not something that they have come into lightly. This is I think something they've been working on for a year or more on to ensure it fit complied with the criteria. They originally reached out to me and we spoke when we were till in the middle of heavy discussions for the previous cell tower. So, you know, I informed him about that. We talked about that and have been in constant contact since then. They have been very thorough to ensure that it fit that requirement.

Council Member Wilson: The question I had raised on the FAA it was not to mentioned to question as to the effect of the tower on navigational equipment but rather the effect of the height of the tower penetrating a terminal list of approach procedures.

Brandon Emory: So there's no impact on anything of air navigation. So planes will not have to change their route. They will not have to change their direction. They will not have to change their approach. It will not effect anything instrumentally for that according to the FAA.

Council Member Wilson: Okay

6. All parties represented by attorneys, the applicant, followed by any opposing party, may present a brief opening statement. (Transcribed)

Marcus Burrell: Any other questions for Brandon at this time? Alright, thank you sir. I'd like to call upon the applicant to give a brief opening and then call it.

Bryant Longest: Mr. Chairmen and members of the council. For the record, my name is Bryant Longest. I am a North Carolina Licensed Attorney. I practice law in Burlington, North Carolina. Our firm is Holt, Longest, Wall, Blaetz and Mosely. We are here because this is a quasi-judicial hearing. To be canny, you're not going to hear a whole lot from me tonight. I've already proven my plot tonight. I think we got everything here for you to consider and if a vote of approval for this tower is signed tonight my main job at this point in time is to introduce to you Jonathan Yates an attorney from Charleston, South Carolina. I've known Jonathan for a number of years. Some of us who have been involved in cellphone matters for a long period of time have known Jonathan as a guru of cellphone towers. He has literally done hundreds of applications in North Carolina, South Carolina, Georgia and I would like to introduce to you Jonathan, my friend and expert in this field.

Jonathan Yates: Thank you so much Bryant and thank you everyone on council for their time. Thank you town attorney and Attorney Longest here. While I'm thanking people, I asked him one hundred and one stupid questions and he never laughed at me and I know you have a new town

planner, congratulations. I also want to thank the people sitting right here, thank you! The purpose of tonight is to bring in infrastructure. When we bring in infrastructure we often think of the cost associated with it. Certain infrastructures are expensive. Sewer, water very expensive. The great thing about wireless is the carrier is paying for it all. The carrier is paying for the infrastructure and that is what we're doing tonight. So the height is 195 feet for the tower and it is designed for Verizon but its also designed for three others at the application level. Since we have made the application, TMobile has said they "Yeah, we want to be on it". So we have designed for Verizon with three others and that's all it takes for us to be able to say that. It's very important that we build for the network where the network requires, but we want to be able to work with the town. So that's why we're building on this property on Covered Bridge Road and it's a piece of property that has been in this family for almost one hundred years. This came from his mother's family. His father farmed it years ago to grow tobacco. Then in the 1960s CBL ran one heck of a transmission line through it that obviously connects to what they call Archer Lodge Substation. And that's another huge thing for us we don't always get to do. We want to merge infrastructure with infrastructure. The property already has a power infrastructure and we want to add the wireless infrastructure. You saw that packet. You go through and you have a very controlled ordinance and a very good ordinance. A couple things. Mr. Wilson, you asked about the FAA. The tower had to be reviewed by the FAA it was reviewed by individual officers on this side of the country and they make the final determination if there's any hazard at all. When they make that determination, they're saying "If you build it as you said you would build it, it will have no impact on air navigation." They also made another important finding. They say at that height and that location as I understand we are about 7 miles north of Raleigh East. So we have a distance from Raleigh East and with that distance it will not have to have lights. 2 to 3 year criteria. Our goal here we want to bring infrastructure but we want to bring it in the most nicest way possible. The site and the property work perfectly for Verizon. It works perfectly now with TMobile. But again we have to account for what it is. We have a six acre property we were able to choose all the set area very easily due to the size of the property. We were able to merge brilliantly with another infrastructure provider. If we are allowed to do it this is what we're looking for, just to scan our book, we have North Carolina not just a regular survey but John Ponnok of Asheville, he determined that there was no threat considering the height. If we are allowed to do it, it takes. Well let me introduce you to some people. We have my good friend George Davis and Ron from the tower company. George is the boss and Ron does all the work. *laughter* If we are allowed to do this, Ron's crew can get the tower up in about 60 days. That timeframe includes pouring the foundation in, letting that set, and power itself installing. After that point Verizon will come out there for probably less than a month. The equipment is all run remotely for the most part. Occasionally a tech will come out for an hour or so to check on the equipment so we are not going to be creating any additional traffic on Covered Bridge Road. In terms of the FAA's determination on the height of the tower there will be no lights, no vibrations, no noise, no fumes, we're clear. What we're looking at is our phones. When you ask my son, its his lifeline. The stupidest thing that I did a few years back, and I have done a lot of stupid things, was getting him an iPad. I don't know what he was doing on it all the time. At all times in his right hand is the iPad or phone. But for other folks its more than just a play thing, it's how you connect to the internet, it's how you get in touch with folks, it becomes a lifeline and its significantly important. In my home county, Charleston County, I apologize as I don't have the statistics for Johnston County. In my home county, 84% of all calls going to 911 dispatch come from a wireless device. Doesn't that make since? When you're in trouble versus having to go borrow a phone and look for a landline. You pull the phone off your hip. My son, when he starts driving which hopefully will be soon he gets in trouble, he can call me. He can call me. So that is why this infrastructure is important. And again this infrastructure is paid for by the carriers. Which is Verizon and TMobile and the other two that may or may not get on sometime in the future. I think the most important to get across tonight is that we have met all your ordinances and we will be able to merge infrastructure with infrastructure with the substation across the street and if we are allowed to do this, it will

be an advantage to the citizens of Archer Lodge. Was that very long speech for a very long night. What I would like to do at this point is see if there are any questions that we may answer for you.

Council Member Bruton: How close is the tower to the transmission line?

Jonathan Yates: It is 125 feet.

Council Member Bruton: Okay, so if there's fall it's not going to be an issue?

Jonathan Yates: No

Jonathan Yates: We have here an engineer a professional engineer on this. What we had professionally engineer to design the tower to the TIA-223 standard for this county which is up to 117 mph winds. He also designed it with the 125 foot fall radius. The power line is 125 feet away so that's why we had that designed into it and again when we talk about a tower fall this is when you're designing for a 500 year length for the tower to do what it is designed to do. This tower is going to be made out of a model pole and what it is designed to do in a heavy wind it is not designed to detach and bend over. Figuratively, if you were to bend straw and I can't bend it back up, it's just going to flex over. That was our design taking into account your Duke Energy Progress power line to ensure we have a certified fall zone on this.

Council Member Wilson: What is the property codes on this?

Brandon Emory: AR. Agricultural Residential.

Council Member Wilson: And that's the historic use of this?

Jonathan Yates: The historic use, Ray's daddy farmed it for tobacco and then the power line came in. Ray and Sue live right next door. Earlier we gave an approximate address, that's their house that they moved into in 1984. And right now Ray lets a neighbor hunt some game in the field there. So basically if you'd drive out there today on the map, you'll see the power line and then across the street the archer lodge substation.

Council Member Bruton: You mentioned liking to combine infrastructures. Did y'all consider attaching it to that H-frame transmission line? That is already built.

Jonathan Yates: We needed the height. What we're trying to do here, what Verizon is trying to do is connect the two closest towers both from about three miles away. We've got a tower about 2.93 miles to the southwest and 3.2 miles to the northeast you have another tower so we needed more elevation than that provided. In addition, we provide additional space at this location. We have Verizon on top and different members like T-Mobile still have space available for both AT&T and Dish if they wish to join. So we needed more height for the network to make the most connection.

Attorney Burrell: Any other questions for the applicant?

Council Member Wilson: I have a question for you. Being that the property is AR is this or is it not one of its permitted uses?

Attorney Burrell: It is permitted with the special use permit. So it is not permitted as of right. If it was a flat out permitted use they could have gone and built it without us ever knowing it. Um because of the nature of what it is the special use permit is required and that's why were here tonight. So it's sort of a permitted use. So it's permitted as long as you allow it.

Brandon Emory: Can I add to that?

Attorney Burrell: Absolutely.

Brandon Emory: Just to clarify on that, we don't have any zoning district where this is a permitted use. Anything that this use can be done is by special use permit only. It wouldn't matter which zoning district it is, it requires a special use permit.

Bryant Longest: If I may before you close the public hearing if you are about to do that I would like for the record to show and reflect that one of the books have been prepared we present as part of the record for this quasi judicial hearing. I thank you for your attention to this. To answer your question I am not familiar with every zoning ordinance in North Carolina but in the municipality that we are in there is a Cellphone Tower is a special use with special ordinances applicable to that.

Council Member Bruton: Do y'all happen to have a site plan?

Unknown: Is that 125 foot minimum from the powerlines? Is that correct?

Council Member Bruton: *inaudible*

Attorney Burrell: There was a question Mr. Yates, regarding the kind of a buffer distance between the 125 breaking point and the 125 feet to the power line.

Jonathan Yates: To their easement line.

Attorney Burrell: Okay.

Jonathan Yates: Yeah, let me clarify. Yes, to their easement. We kept it 125 feet to the CP&L easement.

Bryant Longest: Mr. Chairman if I'm not mistaken I believe that for that right of way is the maximum amount that you would see that.

Attorney Burrell: Yes, and we will accept the book into the record with your application. Is there anything else from the applicant?

Unknown: He had a question.

George Davis: Is it alright if I press this button?

Attorney Burrell: Absolutely, and if you'll please let the board know what the question is.

George Davis: George Davis from TowerCom NC Hwy 55 in Durham, North Carolina. The general body has asked a question about the fall zone relative to the power line easement. As we all know the DOT and powerline easements and the facilities are usually located in the center. In this case the power line goes down the middle of that easement. When the sites near power line easements and other utility uses, gas lines, etc. as long as you are not encroaching on that easement then you have a proper buffer to whatever that use is. In this case the concern was if we are 125 feet to that easement which is what it is, not the actual power line, that if it were to fall there would be no buffer. But there is, because the power line runs down the middle of that easement. You probably have 30ish feet which I'm guessing.

Council Member Wilson: Will the tower be lighted?

George Davis: So again to your earlier question the authority on towers that are vertical is the FAA at the federal level. They trump pretty much everything else. You don't have a local airport authority or any districts we have to deal with here. If there were we would have. But even then the FAA is the ultimate authority on that and the FAA determined that at this height, which most towers that are below 200 feet are not lit, and this one is not lit. So we will not be putting any lighting on the tower which will keep it in harmony with the surrounding residential uses. So there won't be any blinking light on top and at the same time it's perfectly safe to air navigation. There is no low flying aircraft or anything that's doing things lawfully within the FAA navigation that will be effected by the tower. The tower will not change anything.

Unknown: You may mention that the whole easement is not being used but what's to say that? They've got the right to use the whole easement.

George Davis: Again, the separation from our use to any use for that matter is determined to the edge of the easement not to the actual line. We have many sites and we've done that for a reason as well as people in our space have built many towers you know near. We even have sites that are actually in subdivisions. So, from a power companies perspective they have no concerns about it. Again we have sites that are in substations, in different utility providers all over the country up against utility lines. There's certain jurisdictions obviously this isn't one of them where if you're located within a certain distance of an existing utility line or transmission tower it's basically a permitted use. So in a lot of jurisdictions if we did what we did here where we carefully selected best what Mr. Yates said, a like with like type placement that we would get an exemption because we had put in the perfect location trying to blend the infrastructure there.

Bryant Longest: And the other thing to mention is Verizon asked to design it to latest standard to TIA-222H standard so we are very much over design. The event that could have any effect on this tower. We shouldn't see anything in that area. It would have to be such a horrific event to take this down.

Council Member Bruton: Will batteries be stored underground? I'm getting back to my question I asked Brandon about any sort of hazardous material.

Bryant Longest: Anything like that would be removed at conclusion and if there is something there is always a battery back up and they are constantly monitored but will not be stored underground. And in conclusion to your earlier question not only in a green beautiful town, in 30-40 years when this

tower is no longer needed unless there is something I don't know maybe injected into our brain it will be fully removed and that is not only the tower but again as Brandon said restored with everything around it.

laughter

Council Member Bruton: He's not gonna let you talk.

7. Persons opposed to granting the application shall present arguments and evidence against.

Attorney Burrell: Alright, anything further from the applicant? Any questions? Is there anyone to speak for the opposition. Come forward to the microphone and identify yourself, name and address for the record please.

James Matterment: Good Evening, my name is James Matterment and I live on Covered Bridge Road. The tower is going to above my home. We had a couple concerns. First is health concerns, kind of depends on what kinds of fence you're on and which articles you want to read but there is an article saying that if you live within 2,000 feet of a tower you've got an increased risk of cancer exposure. Another concern is if you've got any property feeding into it and right there along we do its going to be an eye sore in the community. A lot of times they try to hide these towers and put some kind of range on them. Another concern is the height of the tower and the location the location is in kind of like a low bottom area. If height is a concern why couldn't it just be put up on a hill somewhere.

Council Wilson: Do you know of any medically documented information that says within so many feet of the tower it can cause cancer?

James Matterment: This has been seen and said over and over again since 2008.

Council Member Bruton: Would you feel better if they did somehow disguise it? I mean I think some people like those fake trees and some don't. My guess I mean is that an option that could be considered?

Attorney Burrell: We can put certain restrictions through the special use design.

James Matterment: That's all I wanted to say.

8. Attorney - To close the Public Hearing unless the hearing has been continued to the next regularly scheduled quasi-judicial hearing or to a publicly stated date, time, and location.

Attorney Burrell: Are there any other questions for Mr. Matterment? Alright. Thank you sir. Is there anyone else that wishes to speak? Alright. Is there any reason before we close this public hearing that it should be continued to a future date for decision? Hearing none, do I have a motion to close the public hearing?

Council Member Wilson: So Moved.

Attorney Burrell: I have a motion. Do I have a second?

Council Member Jackson: Second.

Attorney Burrell: I have a motion and I have a second. All in favor of closing the public hearing? Alright we are out of public hearing.

Attorney Burrell Closed the Quasi-Judicial Public Hearing.

9. Attorney Burrell called for a vote of each of the findings of fact/conclusions for a special use permit.

1. **All applicable specific conditions pertaining to the proposed use have been or will be satisfied.**
2. **Access roads or entrance and exit drives are to or will be sufficient in size and properly located to ensure automotive and pedestrian safety and convenience, traffic flow, and control and access in case of fire or other emergency.**
3. **Off street parking, loading, refuse, and other service areas are located so as to be safe convenient, allow for access in case of emergency, and to minimize economic, glare, odor, and other impacts on adjoining properties in the general neighborhood.**
4. **Utilities, schools, fire, police, and other necessary public and private facilities and services will be adequate to handle the proposed use.**
5. **The location and arrangement of the use on the site, screening, buffering, landscaping, pedestrian ways, and**

bicycle facilities harmonize with adjoining properties and the general area and minimize adverse impact.

- 6. The type, size, and intensity, of the proposed use, including such considerations as the hours of operations, and number of people who are likely to utilize or be attracted to the use, will not have significant adverse impacts on adjoining properties or the neighborhood.**

Moved by Council Member Wilson
Seconded by Jackson

Motion to Open Public Hearing

CARRIED UNANIMOUSLY

Moved by Council Member Wilson
Seconded by Council Member Jackson

Motion to Close Public Hearing

CARRIED UNANIMOUSLY

Moved by Council Member Jackson
Seconded by Council Member Wilson

Motion to Adopt Applicant's Finding of Fact as Your Own

CARRIED UNANIMOUSLY

Moved by Council Member Wilson
Seconded by Mayor Pro Tem Castleberry

Approved Findings of Fact "A" as presented

CARRIED UNANIMOUSLY

Moved by Council Member Wilson
Seconded by Council Member Jackson

Approved Findings of Fact "B" as presented

CARRIED UNANIMOUSLY

Moved by Council Member Jackson
Seconded by Council Member Purvis

Approved Findings of Fact "C" as presented

CARRIED UNANIMOUSLY

Moved by Mayor Pro Tem Castleberry
Seconded by Council Member Purvis

Approved Findings of Fact "D" as presented

CARRIED UNANIMOUSLY

Moved by Council Member Wilson
Seconded by Council Member Jackson

Approved Findings of Fact "E" as presented

CARRIED UNANIMOUSLY

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Approved Findings of Fact "F" as presented

CARRIED UNANIMOUSLY

Moved by Council Member Purvis
Seconded by Council Member Jackson

Motion to Approve Special Use Permit

CARRIED UNANIMOUSLY

Moved by Council member Jackson
Seconded by Council Member Purvis

Motion to Approve Site Plan

CARRIED UNANIMOUSLY

42 - 43

b) Discussion and Possible Action of Amending the Grant Project Ordinance for the American Rescue Plan Act (ARPA) Funds

Ms. Kim Batten explained that the Town elected to use the funding for revenue replacement payments. She shared numbers with the council to show that there were monies freed up to use towards some expenses associated with the park. It was recommended to the Town to amend the

Town's ordinance to show what the funds have been used for in the past two years. Ms. Batten's recommendation is to pass it as amended.

The signed Ordinance#2024-05-1 is attached below.

Moved by Council Member Purvis

Seconded by Mayor Pro Tem Castleberry

Motion to approve AL2024-05-1 Grant Project Ordinance Amending the GPO AL2021-09-1 American Rescue Plan Act ARPA Funds

CARRIED UNANIMOUSLY

[Ordinance# AL2024-05-1 Signed](#)

c) Discussion and Possible Action of Updating the Memorandum of Understanding Between the Town of Archer Lodge and Johnston County Little League

Mr. Bryan Chadwick shared that it has been approximately a year since the Town has had a MOU with the Community Center and Johnston County Little League. Since there has been some things that have transpired, he recommends that there be a new MOU created between the Town and Johnston County Little League (JCLL). According to the current MOU, the Town is to schedule the games and the practices, but it appears as JCLL has been trying to do that. There are other topics that need to be addressed in the MOU as well. Discussion followed. No action needed at this time. It was agreed to speak with JCLL to see if an agreement can be made.

d) Discussion and Possible Action of Approving Contract with HR Management Solutions

Mr. Bryan Chadwick explained that due to things that have transpired in the past few months, there has been discussion of new hires and new policies that has caused the Town to get behind on minutes. Council Member Bruton made a statement discussing her frustration with the agendas being sent to Council late. She explained that there should be a deadline for Council to receive the agenda by the Tuesday before the scheduled meeting. Ms. Kim Batten explained the difficulties that the employees face at Town Hall to get the agendas and the minutes completed. She explained that due to Staff being stretched thin, there is a limit to what can be done with the resources that they have currently. Due to these issues, the Staff presented to Council the idea of contracting someone to complete the minutes in order for the Town to be caught up to date. Discussion followed. It was agreed to discuss this at the June Regular Council Meeting on June 3, 2024.

7. TOWN ATTORNEY'S REPORT:

a) Town Attorney Marcus Burrell had nothing to report.

8. TOWN ADMINISTRATOR'S REPORT:

a) Mr. Chadwick shared that there will be a visit from the water sewer regionalization group. He let the Council know that if they had any questions, to let him or Staff know. CAMPO will be at the Smithfield Public Library on May 23rd to discuss their safety action plan. He will inform any the Council of any further meetings that CAMPO will schedule in the coming months.

9. HUMAN RESOURCES OFFICER/TOWN CLERK'S REPORT:

a) Ms. Martin mentioned to Council that there are some topics that needed to be discussed in anticipation of the budget that have yet to be decided on.

These topics include retention of Staff, service reward programs, and retiree health insurance. She shared that she does need help on the clerk side of things to get tasks completed. She shared with Council that she has two new hires, Marcus Cameron and Jason Kress. Currently, she is working on looking for a part-time employee for the Parks and Recreation Department. Discussion followed regarding restructuring the office staff. She announced that open enrollment time has begun for employees. Ms. Martin shared her ideas for revamping comp time.

10. PARK AND RECREATION DIRECTOR'S REPORT:

- a) Mr. Allen shared his excitement for the promotion of Mr. Marcus Cameron from part-time Athletic Aide to full-time Parks Maintenance Specialist. He shared that Mr. Cameron has over 15 years of experience and is happy to have him on as a full-time employee with the Town. Mr. Allen applied for several grants over the last week including one for training and the equipment for Archery. He added that this as an additional sport that can be offered by the Parks and Recreation Department. Two other grants were applied for at the quantity of \$10,000 each.
-

11. MAYOR'S REPORT:

- a) **Mayor Mulhollem welcomed Jason Kress, the new Town Planner, to the Town.**
-

12. COUNCIL MEMBERS' REMARKS:

- a) **Council Member Wilson joked that his chauffer, his wife, is in attendance to the meeting and that she is getting paid by the hour.**
 - b) **Council Member Jackson mentioned that he will be leaving on a trip to Texas the following Tuesday and would like to see if there is a time to look at the budget between this meeting and his trip or after the 20th of June. He said that he would greatly appreciate it.**
 - c) **Council Member Purvis had nothing to report.**
 - d) **Mayor Pro Tem Castleberry had nothing to report**
 - e) **Council Member Bruton mentioned that CAMPO is scheduled to approve the Southeast Area Study next week and has requested all members to provide a resolution endorsing the Southeast Area Study. Discussion followed.**
-

13. ADJOURNMENT:

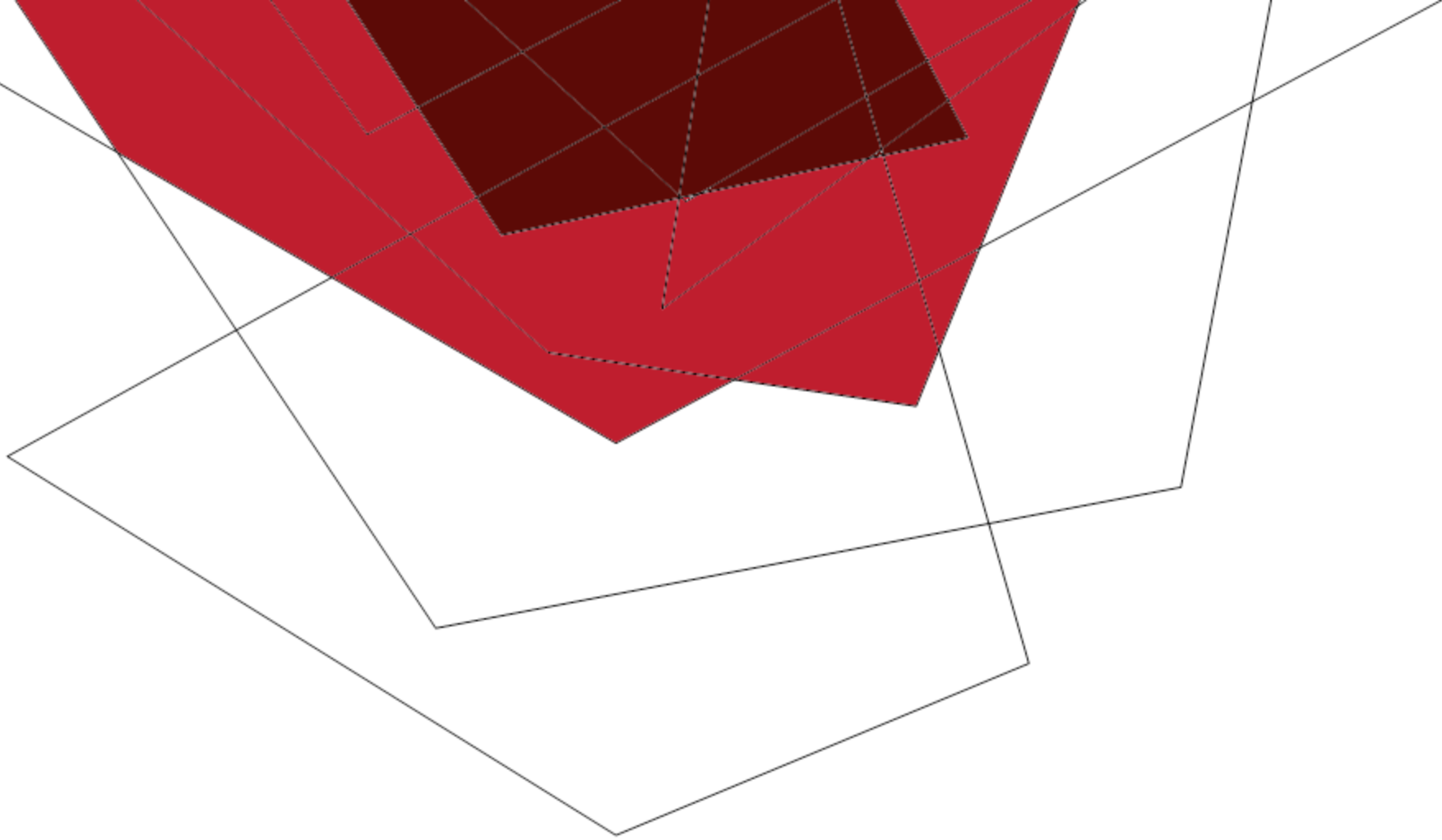
- a) **Having no further business, Mayor Mulhollem called for a motion to adjourn.**

Moved by Council Member Wilson
Seconded by Council Member Jackson
Meeting adjourned at 10:41 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



ARCHER LODGE

Land Use Plan Update

Citizen Survey Report 5-6-24 to Town Council

PLEASE FILL OUT YOUR ARCHER LODGE CITIZEN SURVEY!!!



Growth is coming to Archer Lodge!
Help us update Archer Lodge's
Land Use Plan to guide the Town's
future.



<https://www.surveymonkey.com/r/LandUseArcherLodge>

Thank you for your participation!



Town of
Archer Lodge
Land Use Plan Update
Survey

THANK YOU FOR TAKING THE LAND USE PLAN UPDATE SURVEY!

The Town of Archer Lodge, like most towns in North Carolina, maintains a Land Use Plan to help guide decisions about growth and development. The Town adopted its current Land Use Plan 5 years ago, and a lot has happened since then. Even more change is on the horizon as the last two sections of the NC 540 Outer Loop will open in the next few years. The recent growth in Archer Lodge and the anticipated growth in coming years make it important for the Town to review and update its Land Use Plan for the future.

The Town's current Land Use Plan can be reviewed at:
<https://tinyurl.com/ArcherLodgePlan>

This survey includes a series of questions for Town residents and business owners to guide the work of updating the Land Use Plan. Your input will help the Town craft policies that preserve and enhance Archer Lodge and plan for the future. This is not a scientific survey - it will not measure and calculate your desires. Instead, we've designed this to be more of a friendly check-in to help us understand what is or is not important to folks who live and work in Archer Lodge.

Some of the questions have boxes to select, others are more open-ended with a place for you to write your answers. We have provided space at the end of each question for additional thoughts or other suggestions. You can complete this survey online or via paper copy (available at Town Hall). Online responses may be submitted at: <https://www.surveymonkey.com/r/LandUseArcherLodge>

Please respond to this survey by Friday, March 29, 2024.

Thank you so much for sharing your thoughts about Archer Lodge's future and its Land Use Plan!



Archer Lodge Land Use Plan Update Survey
Results Summary

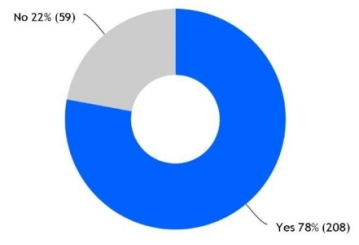
The overwhelming response from those who completed the survey was that Archer Lodge should preserve its small-town identity and tight-knit community. The responses identified traffic as the major concern and an indication that the Town needs to respond to development pressure.

In general, residents were more accepting of increased costs and fees for developers to help mitigate and control the impacts of new development. Increased taxes were by far the least favored mechanism to mitigate the impacts of growth.

SECTION 1: GENERAL QUESTIONS
Questions 1-9 are the general questions that can be applied to the broad direction of the Town. The answers to these questions reveal what people like about Archer Lodge and generally how they would advise Town leaders to approach issues..

Q1 Do you live in the Town of Archer Lodge?

Answered: 267 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	78%	208
No	22%	59
TOTAL		267



QUESTION 2

- Q1. Do you live in Archer Lodge?**

Yes	208
No	59
	267

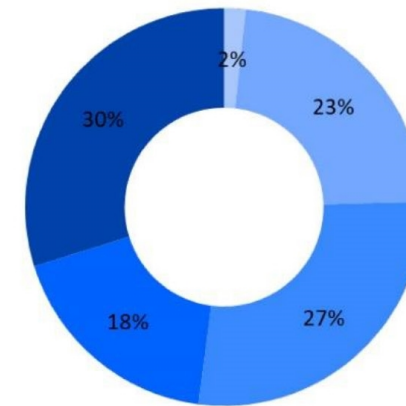
- Q2. How Long?**

Splits at the 10-year mark

Slight majority (52%) in town for less than 10 years

Archer Lodge Land Use Plan Update Survey

Q2 If yes to question 1, how long have you lived in the Town?



■ Less than a year ■ 1-5 years ■ 6-10 years ■ 10-20 years ■ Over 20

Less than a year	2%	3
1-5 years	23%	39
6-10 years	27%	47
10-20 years	18%	31
Over 20 years	30%	51
TOTAL		171

QUESTION 3

Q3 What do you like best about Archer Lodge?

Answered: 159 Skipped: 109

The summary of the 159 comments received is provided below using the exact responses of 11 comments:

RESPONSES

It's a true sense of community. The Community Center is truly that, it gets good use. - Fourth Monday of the month - dinners - Every other Tuesday - Seniors and Lunch - Scouts - Voting, etc.

The peace and quiet, the farmland, no over development, family farms.

Small somewhat affordable, safe community. Archer lodge is as busy as it EVER needs to be.

I like the small-town community aspect of living here. People are not afraid to get to know one another.

It's where I grew up. It's home to me. I love the events AL does for holidays involving parades and events at the ball field that keep traditions alive

We loved the small-town vibe but that has been destroyed recently by the growth and no infrastructure.

Small town with privately owned businesses.

The land ethic of the town seems to be structured well. It is a pleasant rural / suburban area with beautiful land features and authentic small-business farming.

Small-town feel. Open land. Friendly people! The new park is beautiful! Can't wait to see what it becomes!

It's small and quiet, and there are no giant HOA neighborhoods or shopping centers. I love the fields and the little historic gas stations. I love our parades and family events.

Moved to Archer Lodge in Feb 2022, reminded me a lot of my hometown in western PA, not super busy and lots of farm land, small historical places that make the town unique.

- **Small-town**
- **Rural/suburban**
- **Peace & Quiet**
- **Lots of Farmland**
- **No giant neighborhoods or shopping centers**

QUESTION 4

- Residential growth
- Traffic
- Lack of shopping/ restaurants
- Walkability



Q4 What do you dislike the most about Archer Lodge? (Please list your thoughts in the comment box)

Answered: 158 Skipped: 110

The summary of the 158 comments received is provided below using the exact responses of 14 comments.

RESPONSES

Rapid growth in surrounding area, especially too much dense residential development and commercial development in nearby Flowers Plantation and Riverwood, that has increased traffic. Also, since incorporation, taxes have increased significantly without any additional services provided to residents.

No Main Street or small local street

Traffic on Covered Bridge Road and South Murphy. The intersection of the two roads makes it impossible to turn left during many times of the day.

Traffic

Inconvenient of having to travel outside of town to just get a meal out. Wish there was a country cafe in town limits.

The rapid development of housing is crippling our small town. We do not have the infrastructure to support it. I miss the small town feel and sense of community that came with it.

Heavy growth in the area in such a short time has caused congested roads. Traffic circles are needed to keep traffic following instead of building up on main side roads.

The traffic and the lack of traffic control. Lights, 4 way, roundabout, etc.

Traffic congestion No police presence. No consideration of land development or infrastructure.

We need more facilities/fields for kids to participate in various youth sports that are managed well.

Walkability - the new sidewalk between town hall and ALCC is great, but I'd love to see more sidewalks and potentially a trail connecting the new park to the trail in Flowers Plantation

Lack of adequate traffic control. Castleberry, Loop, South Murphy etc. Getting out of our neighborhood is a nightmare (archers pointe) . We continue to build homes without adding infrastructure!

Does not have many local shops or restaurants. Generally have to travel to Clayton to get restaurants and most are fast food chains, would really like to see more local shops and local restaurants.

How fast it has grown in population without the infrastructure to support all of the cars

QUESTION 5

- More retail and services
- Stop new residential development
- Add transportation infrastructure
- Add recreational opportunities

Q5 What would you change about Archer Lodge? (Please list your thoughts in the comment box)

Answered: 148 Skipped: 120

The summary of the 148 comments received is provided below using the exact responses of 12 comments:

I would like to see a 5 to 10 store strip mall in one location with restaurant(s), pharmacy, doctors or dentist office, etc.

I would hope that the Town planners would not lose sight of the original vision of why we incorporated. That was to preserve the countryside of A.L. and to keep it "as is" as best that we could. I feel that this has been done for the most part; however, with talk of business a district, apartments, etc., I wonder if we are losing sight of what I signed on for.

Added turn lanes to keep traffic moving

Expand infrastructure, update the community center.

Stop constant new housing developments Turn signal and right turn only lane at S Murphy/Covered Bridge Turn signal and right turn only lane at covered bridge/buffalo rd by Barnes store

Stop allowing the growth in the country area that is causing so many traffic problems.

I'd try to secure some land and add a few shops near the community center. It needs more of a "Main Street" feel.

Expand and have all the new growth pay their fair share

More pedestrian friendly between the general store and the community center.

Additional community activities along with better traffic planning

Great addition with the park, would be great to see basketball courts, tennis courts, pickle ball. Great start to something worth investing in.

I would love to see more local stores and restaurants added and less chain stores

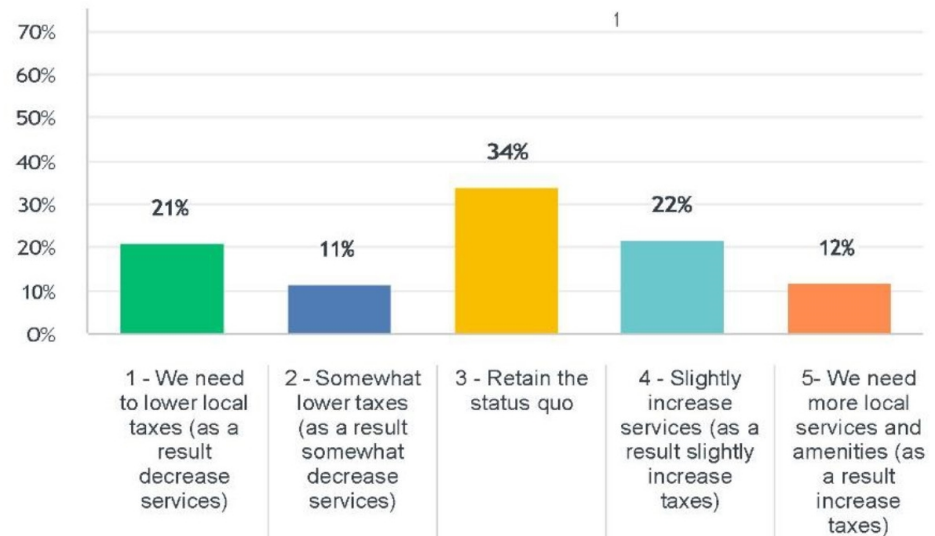
QUESTION 6

- **Maintain Status Quo – 34%**
(note: status quo will require tax increases over time)
- **Increase Services/ Amenities – 34%**
- **Decrease Services/ Amenities – 32%**

Q6 If you were advising Town leaders about opportunities for new Town services (such as bike lanes, trails, and other public amenities) which would have a direct effect on local taxes - would you advise them to lower local taxes (and decrease services), retain the status quo, or promote more local services (and increase taxes)?

ANSWER CHOICES	RESPONSES	
1 - We need to lower local taxes (as a result decrease services)	21%	35
2 - Somewhat lower taxes (as a result somewhat decrease services)	11%	19
3 - Retain the status quo	34%	57
4 - Slightly increase services (as a result slightly increase taxes)	22%	36
5- We need more local services and amenities (as a result increase taxes)	12%	20
TOTAL		167

Answered: 167 Skipped: 101



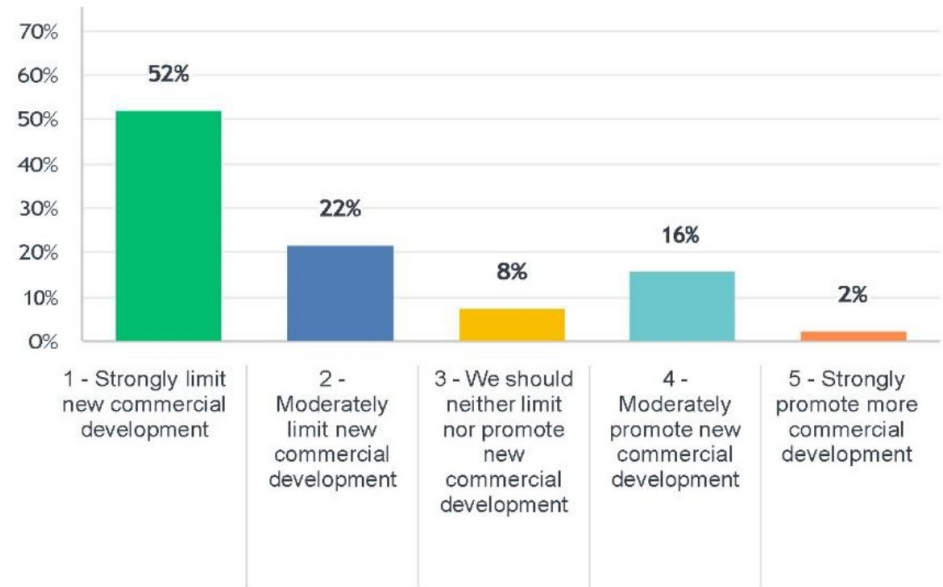
QUESTION 7

- **Limit new commercial development – 74%**
- **Promote new commercial development – 18%**

Q7 If you were advising Town leaders how to consider opportunities for new commercial development in Archer Lodge - would you advise them to limit new commercial development, retain the status quo, or promote more commercial development for Archer Lodge?

Answered: 169 Skipped: 99

ANSWER CHOICES	RESPONSES	
1 - Strongly limit new commercial development	52%	88
2 - Moderately limit new commercial development	22%	37
3 - We should neither limit nor promote new commercial development	8%	13
4 - Moderately promote new commercial development	16%	27
5 - Strongly promote more commercial development	2%	4
TOTAL		169



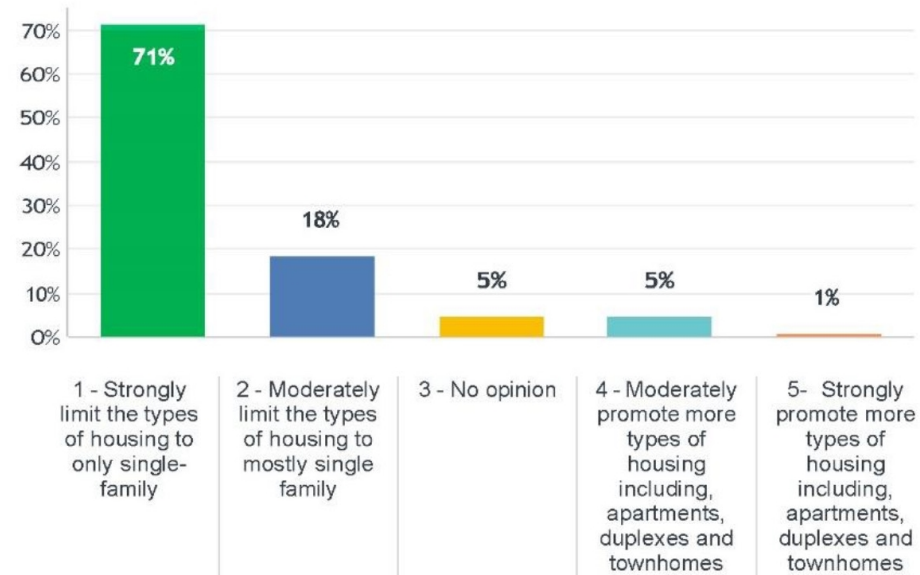
QUESTION 8

- **Limit new residential to single-family detached – 89%**
- **Promote more dense forms of residential – 6%**

Q8 In general, do you think that the Town should limit the types of housing that can be built in Archer Lodge, or should the Town promote more housing types?

Answered: 168 Skipped: 100

ANSWER CHOICES	RESPONSES	
1 - Strongly limit the types of housing to only single-family	71%	120
2 - Moderately limit the types of housing to mostly single family	18%	31
3 - No opinion	5%	8
4 - Moderately promote more types of housing including, apartments, duplexes and townhomes	5%	8
5- Strongly promote more types of housing including, apartments, duplexes and townhomes	1%	1
TOTAL		168



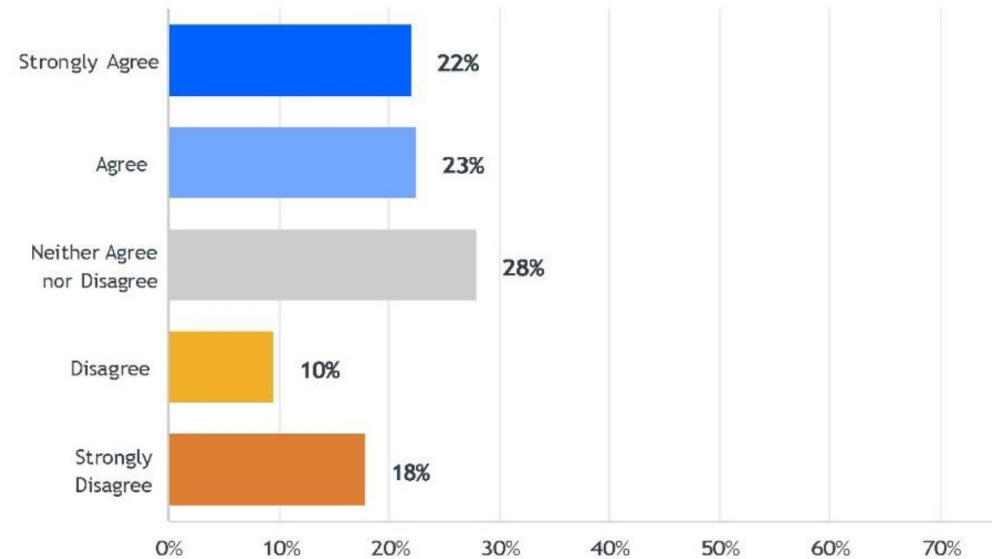
QUESTION 9

- **Support for village center – 45%**
- **Indifferent – 28%**
- **Do not support village center – 28%**

Q9 To what extent do you agree with the following statement: It is important for the Town of Archer Lodge to have a village center.

Answered: 168 Skipped: 100

ANSWER CHOICES	RESPONSES	
Strongly Agree	22%	37
Agree	23%	38
Neither Agree nor Disagree	28%	47
Disagree	10%	16
Strongly Disagree	18%	30
TOTAL		168



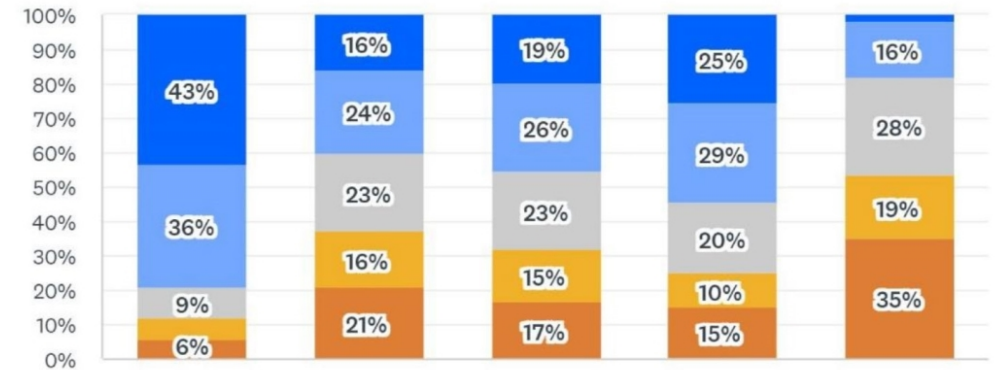
QUESTION 10

- **Traffic congestion is a problem – 79%**
- **Need more sidewalks/bike lanes – 40% (evenly split)**
- **Need more trails & greenways – 45%**
- **Raise costs for new development – 54%**
- **Do not raise taxes – 54%**

Q10 To what extent do you agree/disagree with the following statements:

Answered: 167 Skipped: 101

	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL
Traffic congestion is a problem in Archer Lodge	6% 10	6% 10	9% 15	36% 60	43% 72	167
Archer Lodge needs more sidewalks and bike lanes	21% 35	16% 27	23% 38	24% 40	16% 26	166
Archer Lodge needs more trails and greenways	17% 28	15% 25	23% 28	26% 43	19% 32	166
The town should increase costs for new development to maintain more control over streets, sidewalks, and bike lanes	15% 25	10% 17	20% 34	29% 48	25% 42	166
The town should increase taxes for residents to maintain more control over streets, sidewalks, and bike lanes	35% 59	19% 31	28% 47	16% 27	2% 3	167



Traffic congestion is a problem in Archer Lodge

Archer Lodge needs more sidewalks and bike lanes

Archer Lodge needs more trails and greenways

The town should increase costs for new development to maintain more control over streets, sidewalks, and bike lanes

The town should increase taxes for residents to maintain more control over streets, sidewalks, and bike lanes

Strongly Disagree Disagree Neither Agree nor Disagree Agree Strongly Agree

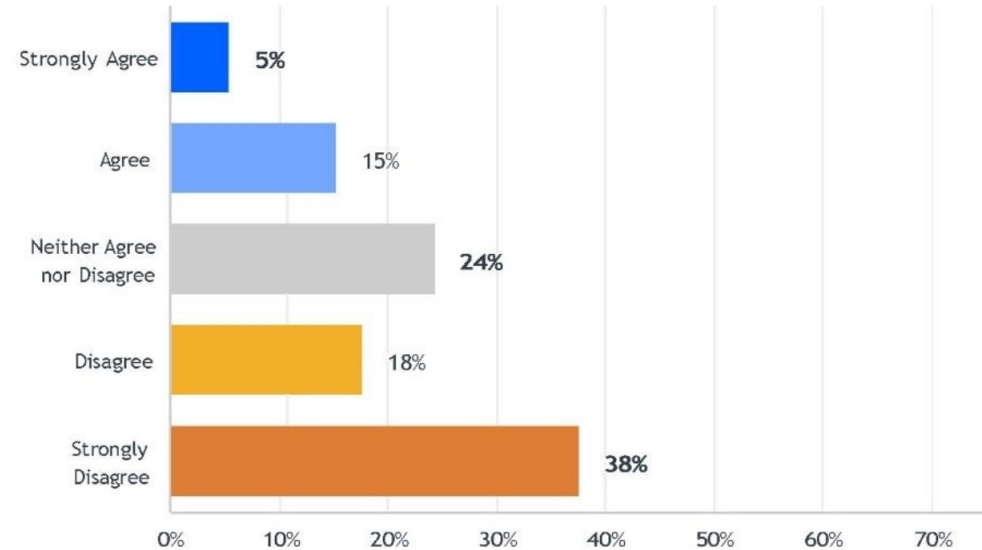
QUESTION 11

- **Do not support public sewer expansion – 56%**
- **Support public sewer expansion – 20%**

Q11 To what extent do you agree with the following statement: The Town of Archer Lodge should seek to expand public sewer for wastewater treatment in the Town. (Select your answer from the options below)

Answered: 165 Skipped: 103

ANSWER CHOICES	RESPONSES	
Strongly Agree	5%	9
Agree	15%	25
Neither Agree nor Disagree	24%	40
Disagree	18%	29
Strongly Disagree	38%	62
TOTAL		165



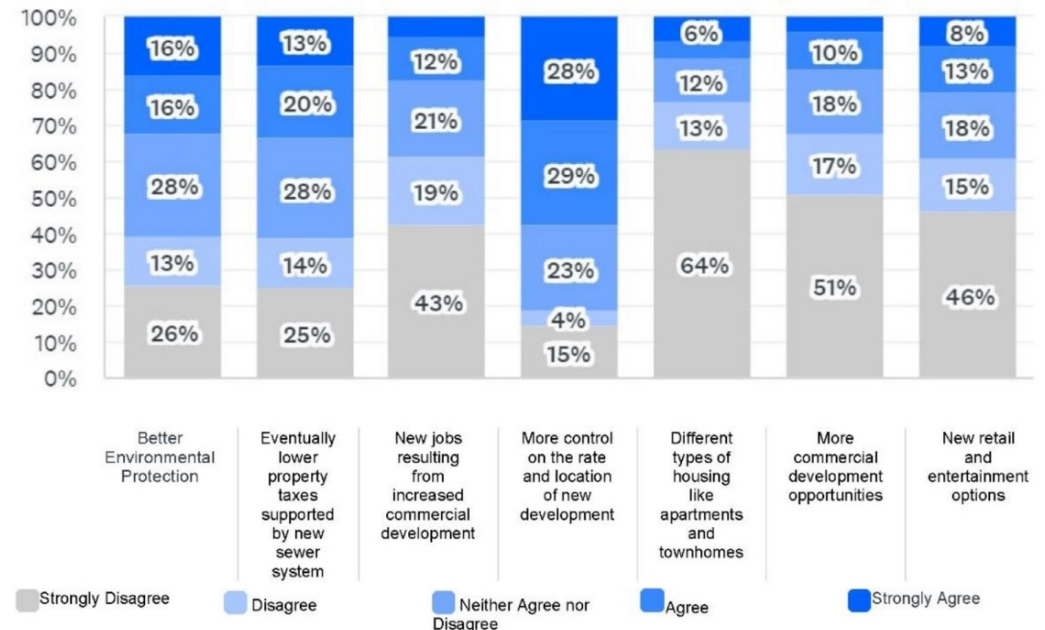
QUESTION 12

- **Not important to have sewer for residential – 77%**
- **Not important to have sewer for commercial – 68%**
- **Not important to have sewer for retail/entertainment – 61%**

Q12 Below is a list of potential benefits associated with providing public sanitary sewer services to residents of Archer Lodge. How important is it to you that the Town provides these benefits through a public sewer system for wastewater treatment?

Answered: 160 Skipped: 108

	1 – NO IMPORTANCE	2 – LITTLE IMPORTANCE	3 – SOME IMPORTANCE	4 – MODERATE IMPORTANCE	5 – EXTREME IMPORTANCE	TOTAL
Better Environmental Protection	26% 41	13% 21	28% 45	16% 26	16% 25	158
Eventually lower property taxes supported by new sewer system	25% 39	14% 21	28% 44	20% 31	13% 20	155
New jobs resulting from increased commercial development	43% 67	19% 30	21% 33	12% 19	5% 8	157
More control on the rate and location of new development	15% 23	4% 7	23% 37	29% 46	28% 45	158
Different types of housing like apartments and townhomes	64% 100	13% 21	12% 19	4% 7	6% 10	157
More commercial development opportunities	51% 80	17% 27	18% 28	10% 16	4% 6	157
New retail and entertainment options	46% 73	15% 23	18% 29	13% 20	8% 12	157



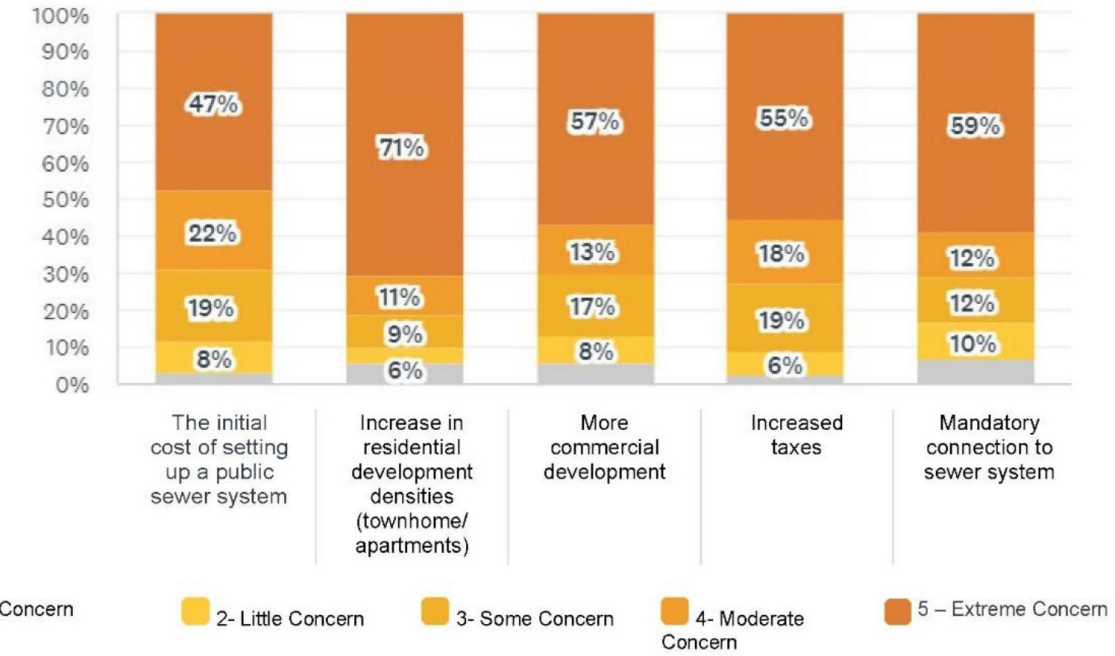
QUESTION 13

- **Very concerned about sewer resulting in new residential development – 71%**
- **Very concerned about rules requiring mandatory sewer connection – 59%**
- **Very concerned about sewer resulting in new commercial development – 57%**

Q13 Below is a list of potential concerns associated with providing public sanitary sewer services to residents of Archer Lodge. How concerned are you with the following impacts of a public sewer system for wastewater treatment?

Answered: 160 Skipped: 108

	1- NO CONCERN	2- LITTLE CONCERN	3- SOME CONCERN	4- MODERATE CONCERN	5- EXTREME CONCERN	TOTAL
Initial cost of setting up a public sewer system	3% 5	8% 13	19% 31	22% 35	47% 75	159
Increase in residential development densities (townhome/apartments)	6% 9	4% 7	9% 14	11% 17	71% 113	160
More commercial development	6% 9	8% 12	17% 27	13% 21	57% 91	160
Increased taxes	3% 4	6% 10	19% 30	18% 28	55% 88	160
Mandatory connection to sewer system	7% 11	10% 16	12% 19	12% 19	59% 94	159



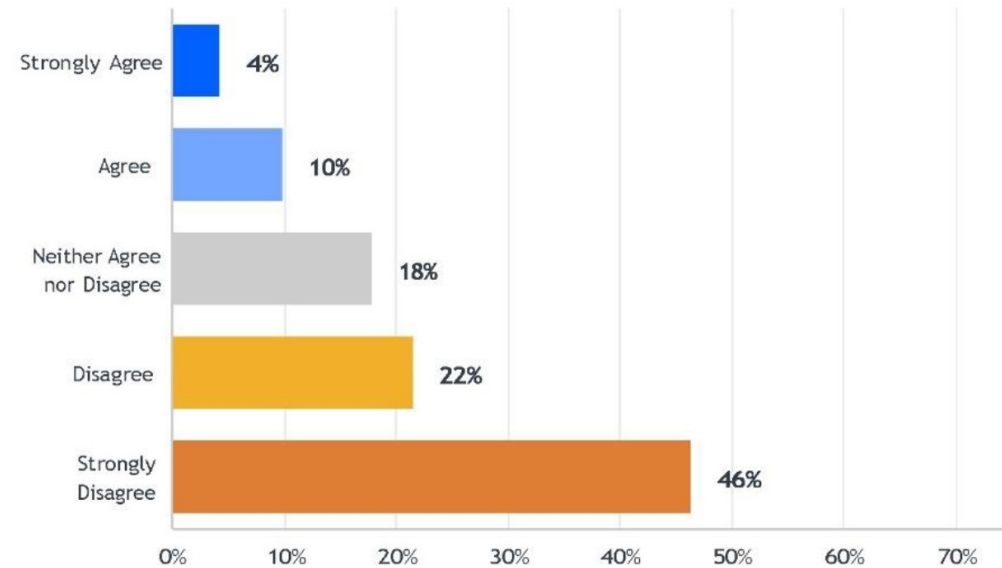
QUESTION 14

- **Disagree – 66%**
- **Agree – 14%**

Q14 To what extent do you agree with the following statement: The Town should encourage more commercial development.

Answered: 162 Skipped: 106

ANSWER CHOICES	RESPONSES	
Strongly Agree	4%	7
Agree	10%	16
Neither Agree nor Disagree	18%	29
Disagree	22%	35
Strongly Disagree	46%	75
TOTAL		162

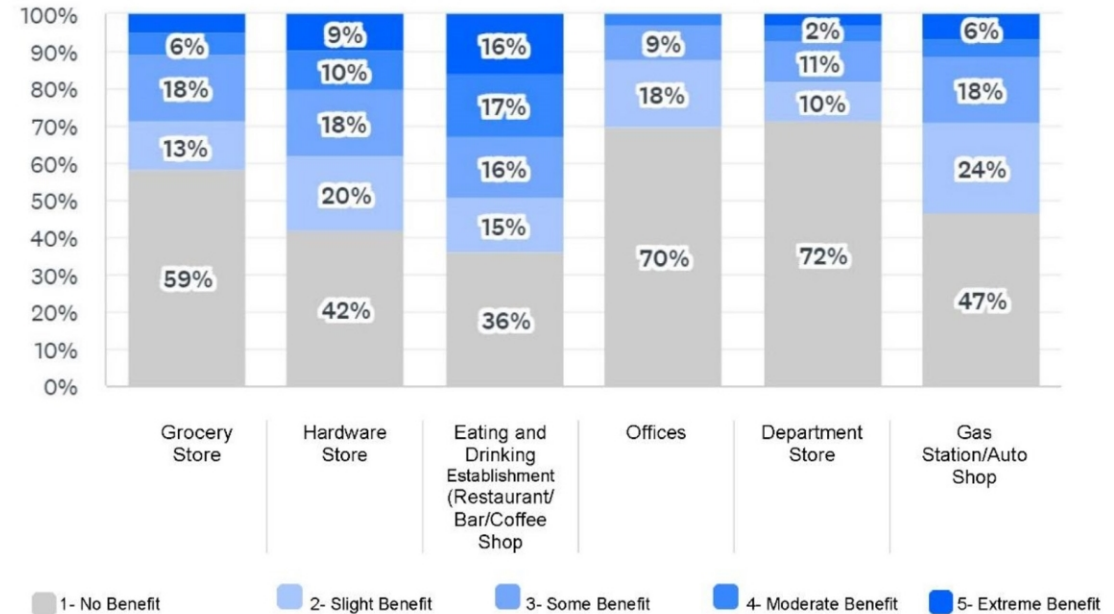


QUESTION 15

- **No benefit from department store, offices, or grocery store**
- **Moderate/extreme benefit from eating and drinking establishment – 33%**

Q15 To what extent, if any, do you think that the following forms of commercial development would be beneficial for the Town? (Select a number between 1 and 5; 1 indicating no benefit, and 5 indicating the most benefit)

	1- NO BENEFIT	2- SLIGHT BENEFIT	3- SOME BENEFIT	4- MODERATE BENEFIT	5- EXTREME BENEFIT	TOTAL
Grocery Store	59% 95	13% 21	18% 29	6% 9	5% 8	162
Hardware Store	42% 68	20% 33	18% 29	10% 17	9% 15	162
Eating and Drinking Establishment (Restaurant/Bar/Coffee Shop)	36% 59	15% 24	16% 29	17% 27	16% 26	162
Offices	70% 112	18% 29	9% 15	3% 4	0% 0	160
Department Store	72% 116	10% 17	11% 18	4% 7	2% 4	162
Gas Station/Auto Shop	47% 75	24% 39	18% 29	5% 8	6% 10	161



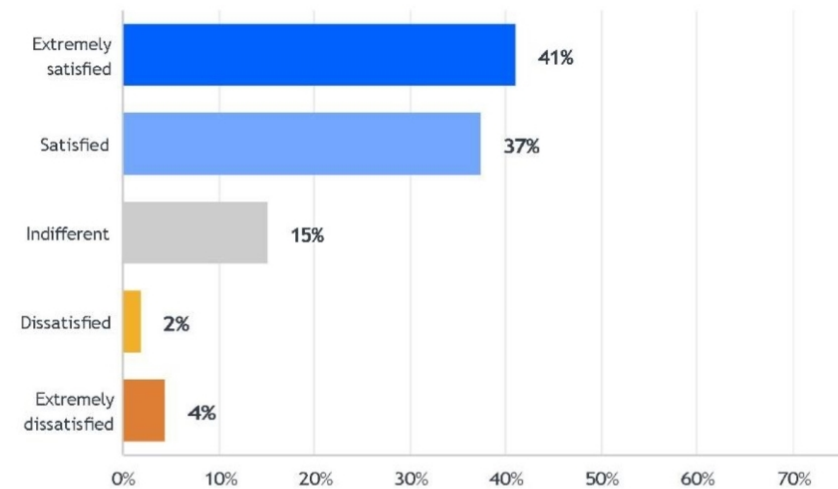
QUESTION 16

- Satisfied – 78%
- Dissatisfied – 6%

Q16 How satisfied are you with the types of housing available in the Town?

Answered: 158 Skipped: 110

ANSWER CHOICES	RESPONSES	
Extremely satisfied	41%	65
Satisfied	37%	59
Indifferent	15%	24
Dissatisfied	2%	3
Extremely dissatisfied	4%	7
TOTAL		158



Below is a summary of additional comments received that we have provided by sharing these 5 sample comments below.

OTHER COMMENTS? (LIMIT: 100 CHARACTERS)

Limit apartments and townhomes

Cookie Cutter Homes

Would like to see a small duplex or condo development.

We don't need apartments or townhomes. Leave it the way it is.

it's too expensive now

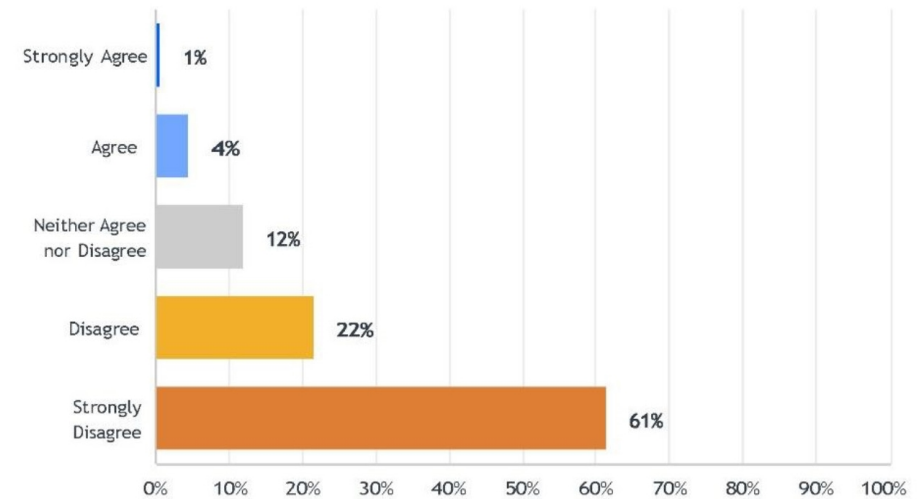
QUESTION 17

- Disagree – 83%
- Agree – 5%

Q17 To what extent do you agree with the following statement: The Town should allow for more multifamily housing options.

Answered: 158 Skipped: 110

ANSWER CHOICES	RESPONSES	
Strongly Agree	1%	1
Agree	4%	7
Neither Agree nor Disagree	12%	19
Disagree	22%	34
Strongly Disagree	61%	97
TOTAL		158



Below is a summary of the additional comments received that we have provided by sharing these 5 sample comments below.

OTHER COMMENTS? (LIMIT: 100 CHARACTERS)

There has recently been a big increase already... please evaluate non owner occupancy

NO APARTMENTS OR TOWNHOMES

There is a rental community in Riverwood & others available in Flowers. While multifamily housing supports diversity, it strains infrastructure. Our schools are at capacity & it's nearly impossible to turn onto Covered Bridge during the AM/PM commute.

We are too crowded

The reality is that multi family housing (mainly apartments) comes with increased crime and the decline of a peaceful community.

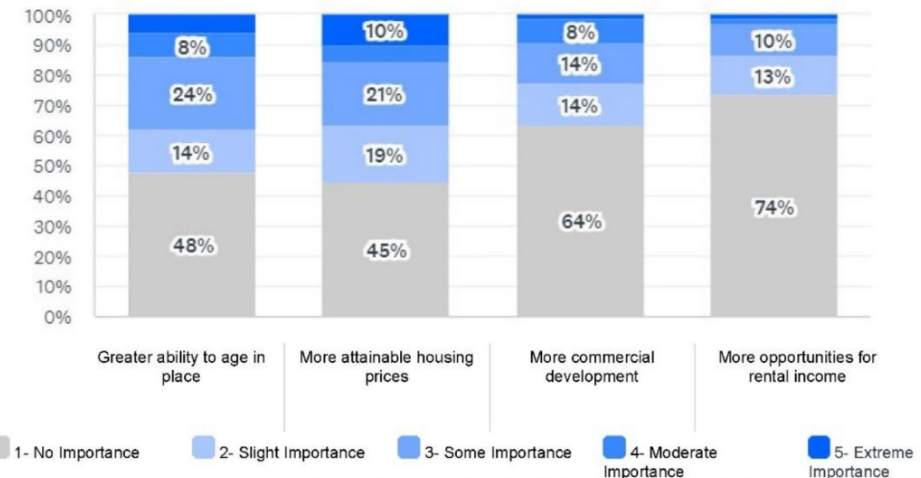
QUESTION 18

- **Rental income not important (74%)**
- **More commercial development not important (64%)**
- **Ability to age in place not important (48%)**
- **Lower housing prices not important (45%)**

Q18 If the Town were to allow more types of housing, there are several potential benefits for Town residents. How important is it to you that the Town provides these benefits by increasing housing choices?

Answered: 155 Skipped: 113

	1 - NO IMPORTANCE	2 - SLIGHT IMPORTANCE	3 - SOME IMPORTANCE	4 - MODERATE IMPORTANCE	5 - EXTREME IMPORTANCE	TOTAL
Greater ability to age in place	48%	14%	24%	8%	6%	154
More attainable housing prices	45%	19%	21%	5%	10%	152
More commercial development	64%	14%	14%	8%	1%	154
More opportunity for rental income	74%	13%	10%	1%	1%	153



Below is a summary of additional comments received that we have provided by sharing these 5 sample comments below.

OTHER COMMENTS? (LIMIT: 100 CHARACTERS)

Rentals and new homes are outrageously priced. Single family homes only. We do not want Archer Lodge to become Flowers Plantation. The first questions should be addressing infrastructure and schools. I.e. Stoplights on some of our major roads to avoid more fatal accidents like the one at Castleberry and 42 recently.

Pride in ownership is lost. Combine that with absent landlords and we have a recipe for issues. Home prices can also be affected.

No more rental properties

No benefit to apartments and low income housing unless you are the person that owns the land on which that low income housing is being built.

Don't need more rental properties, the ones in our development aren't even owned by local people. Ridiculous!

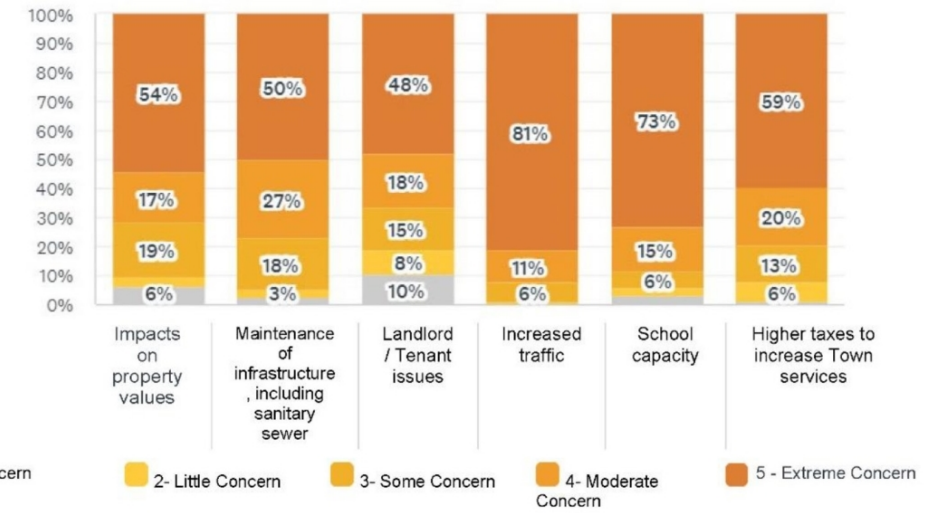
QUESTION 19

- **Increased traffic – 81%**
- **Reduced school capacity - 73%**
- **Higher taxes – 59%**
- **Perceived negative impacts on property values – 54%**

Q19 If the Town were to allow more types of housing, how concerned are you with the potential impacts of increasing housing choices?

Answered: 155 Skipped: 113

	1- NO CONCERN	2- LITTLE CONCERN	3- SOME CONCERN	4- MODERATE CONCERN	5- EXTREME CONCERN	TOTAL
Impacts on property values	6% 10	3% 5	19% 29	17% 27	54% 84	155
Maintenance of infrastructure, including sanitary sewer	3% 4	3% 4	18% 28	27% 41	50% 77	154
Landlord/Tenant issues	10% 16	8% 13	15% 23	18% 28	48% 74	154
Increased traffic	0% 0	1% 2	6% 10	11% 17	81% 126	155
School capacity	3% 5	3% 4	6% 9	15% 23	73% 113	154
Higher taxes to increase Town services	1% 2	6% 10	13% 20	20% 31	59% 92	155



Below is a summary of additional comments received that we have provided by sharing these 5 sample comments below.

OTHER COMMENTS? (LIMIT: 100 CHARACTERS)

- The more people you put (pack) into an area is going to affect everyone, keep it as it is
- Stop building and stop raising taxes
- Our schools are capped already, traffic is congested and our roads need maintenance due to the heavy traffic.
- There are 100s of apartments and townhomes going in at the "Waterfront" District and even more already built towards Clayton and in Flowers. For those interested in the area and looking for these options, they are available in the same general vicinity.
- WE DON'T WANT APPARTMENTS!!!!

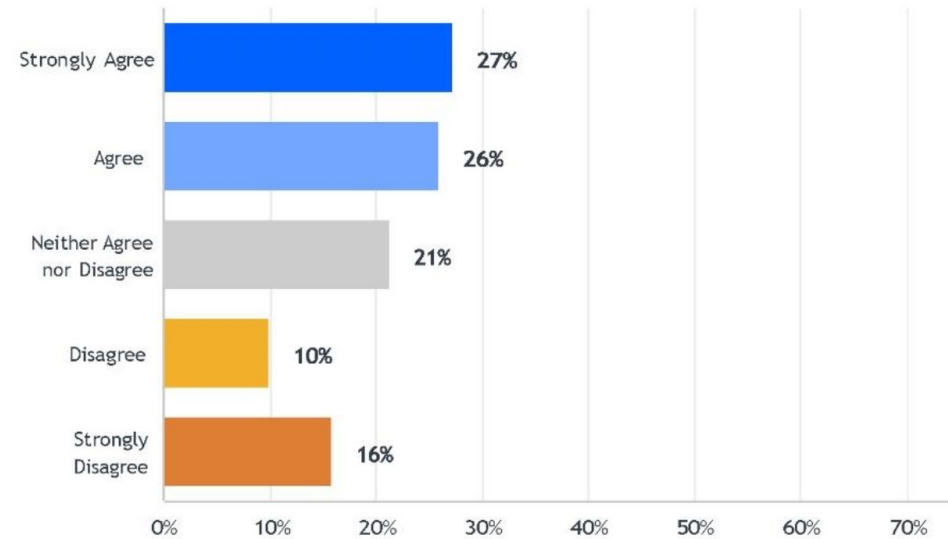
QUESTION 20

- **Agree – 53%**
- **Disagree – 26%**

Q20 To what extent do you agree with the following statement: The Town of Archer Lodge should include the area outside of the Town’s current corporate limits within the Town’s planning jurisdiction to manage how it can be developed in the future.

Answered: 151 Skipped: 117

ANSWER CHOICES	RESPONSES	
Strongly Agree	27%	41
Agree	26%	39
Neither Agree nor Disagree	21%	32
Disagree	10%	15
Strongly Disagree	16%	24
TOTAL		151



QUESTION 21

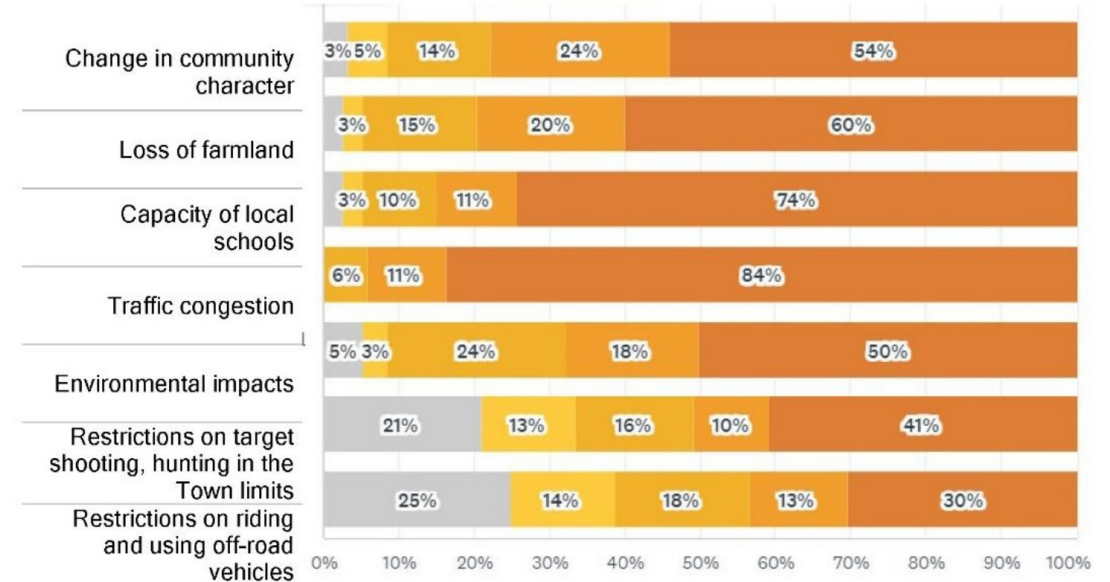
Concerns about more growth:

- **Traffic congestion - 84%**
- **Negative impacts on school capacity - 74%**
- **Loss of farmland - 60%**
- **Change community character – 54%**

Q21 Please indicate your level of concern for each of the potential impacts of growth below. (Select a number between 1 and 5; 1 indicating no concern, and 5 indicating the most concern)

Answered: 152 Skipped: 116

	1- NO CONCERN	2- LITTLE CONCERN	3- SOME CONCERN	4- MODERATE CONCERN	5- EXTREME CONCERN	TOTAL
Change in community character	3% 5	5% 8	14% 21	24% 36	54% 82	152
Loss of farmland	3% 4	3% 4	15% 23	20% 30	60% 91	152
Capacity of local schools	3% 4	3% 4	10% 15	11% 16	74% 112	151
Traffic congestion	0% 0	0% 0	6% 9	11% 16	84% 127	152
Environmental impacts	5% 8	3% 5	24% 36	18% 27	50% 76	152
Restrictions on target shooting, and hunting in the Town limits	21% 32	13% 19	16% 24	10% 15	41% 62	152
Restrictions on riding and using off-road vehicles	25% 38	14% 21	18% 27	13% 20	30% 46	152



QUESTION 22

Q22 We wanted to provide an opportunity for you to let us know if we missed anything in our consideration of Archer Lodge's future. Do you have any additional comments or thoughts about how the Town should grow?

Answered: 59 Skipped: 209

We received 59 comments and we've summarized these by sharing 9 comments below:

RESPONSES

Thank you for doing this and asking for our input.

Everywhere in this state, there are small communities being ruined by unnecessary growth. I hope this towns officials; listen to the community.

Archer Lodge is one of the few remaining areas that is supporting farming. This is an important resource that must be cherished and protected.

Need for increased public schools, traffic control, and green space.

Archer lodge is a fantastic area where families can still enjoy some of the perks of a rural upbringing. If further development if permitted, the town would risk becoming just like every other overpopulated place. Just look at all the condos in areas like Knightdale and what's happening in flowers... that would change the culture of this community entirely, and not for the better.

Some growth is necessary but slow growth is critical.

Please do not bring in big commercial stores or apartments! Keep the small-town character! Limit commercial development

concern is that people are allowed to fire guns in very close proximity to residential homes and community parks. We are gun owners, however there should be laws to prevent firing guns so close to homes and parks. Perhaps town can have community firing range instead for those that enjoy shooting.

Before any new development should be considered, BUILD MORE SCHOOLS! The ones we have are overcrowded. Take care of what is here already instead of what could be.

THINGS TO REMEMBER...

These numbers should not be used to infer the entire community's sentiment

- Response rates were low
- Respondents were self-selected
- This is not a random sample



ADDRESS TRAFFIC CONGESTION

**LIMIT NEW COMMERCIAL
DEVELOPMENT**

**LIMIT NEW RESIDENTIAL TO
SINGLE-FAMILY DETACHED**

KEEP TAXES LOW

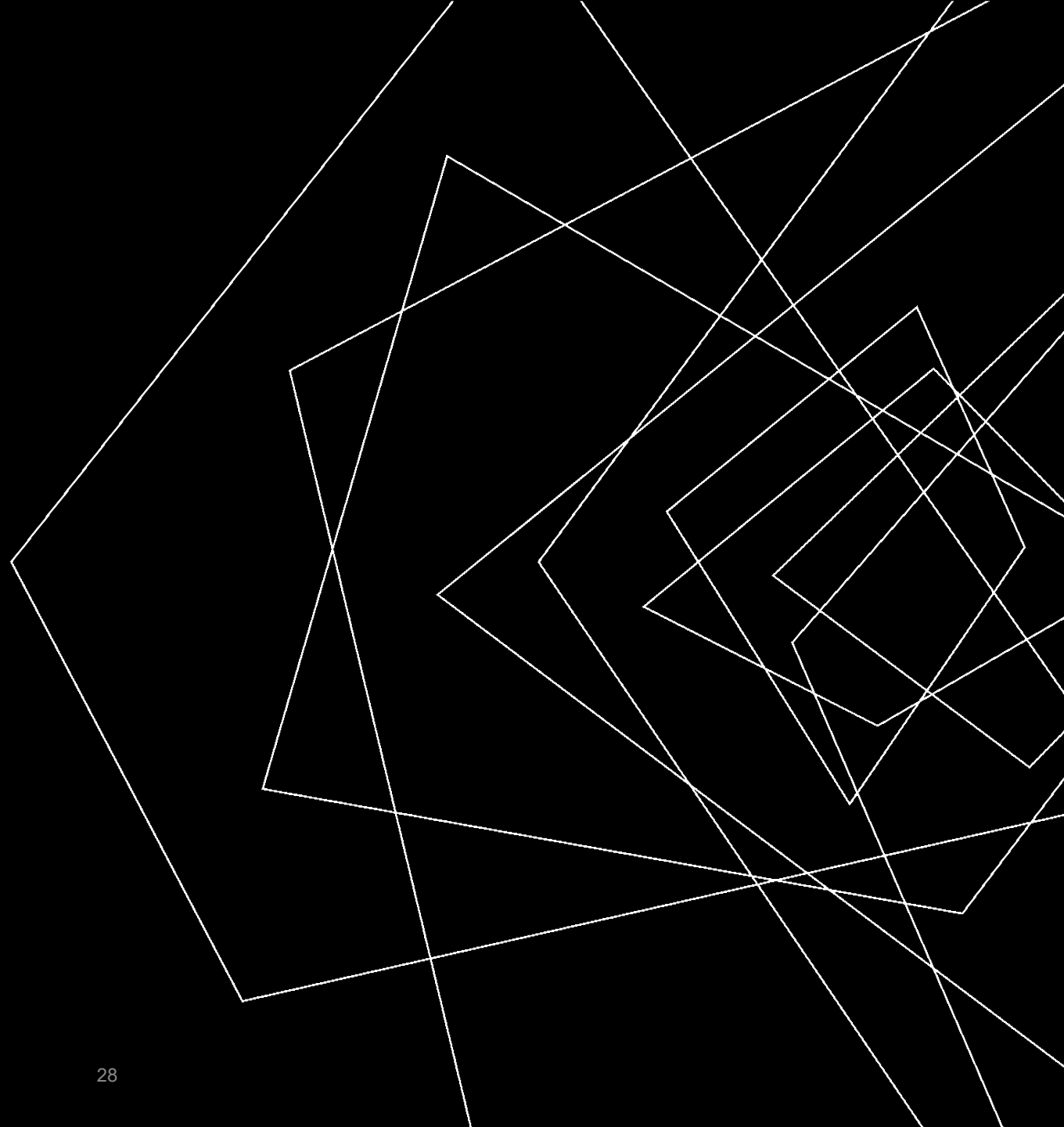
DO NOT PURSUE PUBLIC SEWER

SUPPORT FOR ETJ EXTENSION

NEXT STEPS:

**SURVEY REPORT AS
PART 2 OF PLAN**

**PUBLIC FORUM 2 –
COMMUNITY VISION,
PLAN GOAL
DISCUSSION**



**TOWN OF ARCHER LODGE
GRANT PROJECT ORDINANCE AMENDING THE
GRANT PROJECT ORDINANCE# AL2021-09-1 FOR THE
AMERICAN RESCUE PLAN ACT FUNDS**

BE IT ORDAINED by the Town Council of the Town of Archer Lodge, North Carolina, that, pursuant to Section 13.2 of Chapter 159 of the General Statutes of North Carolina, the following grant project ordinance is hereby amended as set forth below:

- Section 1. This ordinance established a budget for the grant project to be funded by the American Rescue Plan Act of 2021 (ARPA). The Town of Archer Lodge received grant funds totaling \$1,050,426.75 which were provided in two disbursements. The first disbursement in the amount of \$525,213.38 was received on August 13, 2021 and the second disbursement in the amount of \$525,213.37 was received on August 5, 2022.
- Section 2. These funds could have been used for any of the following categories of expenditures in accordance with the American Rescue Plan Act of 2021, and to the extent authorized by North Carolina state law.
1. Support public health expenditures, by funding COVID-19 mitigation efforts, medical expenses, behavioral healthcare, and certain public health and safety staff;
 2. Address negative economic impacts caused by the public health emergency, including economic harms to workers, households, small businesses, impacted industries, and the public sector;
 3. Replace lost public sector revenue, using this funding to provide government services to the extent of the reduction in revenue experienced due to the pandemic;
 4. Provide premium pay for essential workers, offering additional support to those who have borne and will bear the greatest health risks because of their service in critical infrastructure sectors; and,
 5. Invest in water, sewer, and broadband infrastructure, making necessary investments to improve access to clean drinking water, support vital wastewater and stormwater infrastructure, and to expand access to broadband internet.
- Section 3. The Town elected to take the standard allowance, as authorized by 31 CFR Part 35.6(d)(1) and expend all its ARPA funds for the provision of government services.
- Section 4. The Town of Archer Lodge has until December 31, 2024 to use or encumber these funds and if encumbered, the Town has until December 31, 2026 to finish any associated work on the grant project.

Section 5. The following amounts are appropriated for the project and authorized for expenditure:

Internal Project Code	Project Description	Expenditure Category (EC)	Cost Object	Appropriation of ARP/CSLFRF Funds
001	General administration services for period of March 3, 2021 through March 31, 2024	6.1	Salaries	\$ 635,289.27
			Benefits	\$ 52,928.00
002	Economic and physical development services for period of March 3, 2021 through March 31, 2024	6.1	Contracts	\$ 362,209.48
TOTAL				\$1,050,426.75

Section 6. The following revenues were available to complete the project:

ARPA Funds	\$	<u>1,050,426.75</u>
Total	\$	<u>1,050,426.75</u>

Section 7. The Finance Officer maintained within the ARPA Grant Project Fund specific detailed accounting records to satisfy the requirements of the grantor agency, the grant agreements and any state regulations that may apply.

Section 8. The Council ratified the acceptance of ARPA funds on August 13, 2021 and the actions of the Finance Officer with regards to said funds.


Section 9. The Finance Officer was directed to report on the financial status of the project as needed by Council.

Section 10. Copies of the Amended Grant Project Ordinance shall be furnished to the Budget Officer, the Finance Officer and to the Town Clerk.

Section 11. This grant project ordinance expires on December 31, 2026, or when all the ARPA funds have been expended by the Town, whichever occurs first.

DULY ADOPTED THIS, THE 6TH DAY OF MAY 2024.

TOWN OF ARCHER LODGE


Matthew B. Mulhollem, Mayor

(SEAL)



ATTEST:



Jenny Martin, Town Clerk



**Work Session - Minutes
Monday, May 20, 2024**

COUNCIL PRESENT:

- Mayor Mulhollem
- Mayor Pro Tem Castleberry
- Council Member Bruton
- Council Member Purvis
- Council Member Wilson

STAFF PRESENT:

- Bryan Chadwick, Town Administrator
- Kim P. Batten, Assist. Town Admin./Finance Officer
- Brandon Emory, Town Planner
- Chris Allen, Parks & Recreation Director
- Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

- Council Member Jackson

STAFF ABSENT:

- Marcus Burrell, Town Attorney

1 WELCOME/CALL TO ORDER

- a) **Mayor Mulhollem called the meeting to order at 6:30pm in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present.**

2 INVOCATION & PLEDGE OF ALLEGIANCE

- a) **Mayor Pro Tem Castleberry offered the invocation. Mayor Mulhollem led the Pledge of Allegiance to the US Flag.**

3 FINANCIAL REPORTS ~ KIM BATTEN

- a) **Interim Financial Reports for April 2024**

Ms. Batten shared an interim summary for all funds ending April 30, 2024. She shared that we are at about 82% collected in revenues. She explained that we received our grant from Johnston County and explained the tax money that we have received. For the month, we are in the red by around \$45,000. The actual to date net difference between revenues and expenditures in the General Fund is around \$609,000. Discussion followed.

Regarding the Capital Reserve Fund 31, Ms. Batten mentioned that the only transaction for the month is the investment earnings.

Regarding the Park Reserve Fun 31, Ms. Batten mentioned that the only activity has been the investment earnings and the \$0.02 transfer for the taxes. The monthly revenue for the Park Reserve Fund 31 is around \$1,600.

Regarding the Public Safety Reserve Fund 32, Ms. Batten mentioned that the only activity has been investment earnings.

When comparing revenues in April 2023 with April 2024 in the General Fund, Ms. Batten mentioned it's about a \$1,000,000 decrease.

4 DISCUSSION ITEMS FROM MAY 6 COUNCIL MEETING

a) Human Resources/Town Clerk ~ Jenny Martin

- Employee Service Awards
 - Ms. Martin explained the information that was previously provided. She explained that she would like to do this program to celebrate employees. She noted that she would like the Council to focus on the dollar amount of the awards so that she can ensure that the prizes are within that range. The goal would be to present these items at the Council Meetings to recognize their service. Discussion followed.
- Retiree Health Insurance
 - Ms. Martin shared that she wanted to look into Retiree Health Insurance to draw people to the Town of Archer Lodge as well as encourage retention due to this incentive. She explained that the coverage would be broken down in tiers. Discussion followed. More information requested.
- Updated FLSA & Overtime Pay Provisions Policy
 - Ms. Martin explained that there was already a FLSA policy in place and that she just updated the policy. She explained the different categories of employees and how they are compensated by the comp time. To assist with the cost, she changed the policy to include a cut off of comp time earned for non-exempt employees. Discussion followed.

b) Town Clerk Assistance

- Contract with HR Management Solutions
 - Mr. Bryan Chadwick shared that he wanted to bring back up the independent contractor to see how Council would like to pursue. Council Member Purvis suggested reaching out to UNC School of Government for a part-time intern for the summer, which has potential to turn into a full-time role. Discussion followed. It was decided to not seek a contract.

5 BUDGET OFFICER/TOWN ADMINISTRATOR ~ BRYAN CHADWICK

a) FY2024/2025 Budget Workshop Continued

Mr. Chadwick explained the worksheet that was presented. He explained the potential need for additional part-time employees for Parks and Rec and possibly for an intern that would convert into the Town Clerk role.

Mr. Chadwick also discussed changing the lights to LEDs and the potential expenses that are associated with that change. Discussion followed regarding the funding and the options for it. Questions were presented regarding the Community Center and how they were able to afford their expenses before the Community Center and the Town were able to come to an agreement. Discussion followed. It was suggested to potentially apply for grants.

Ms. Kim Batten explained that in the budget, they need to talk about an accessibility grant that will assist in building equipment for disabled children, veterans, and others. She stated that they will need to prove that they have the funds available for the Town's portion of expenses. Discussion followed.

Mr. Chadwick discussed revenues for property taxes and the potential increases that may be coming based on the surrounding areas. Discussion followed.

Mr. Chadwick presented the income from the JoCo ABC Distribution as well as the increase in expenditure included for public safety.

The plan is to present the Budget at the June 3rd Regular Council Meeting. There will be a Special Meeting held on the June 24th.

6 UPCOMING EVENTS

- a) **Mr. Chadwick shared that Mike Gordon's retirement celebration to be held on May 30th at 5:00 p.m.**

7 ADJOURNMENT

- a) **Having no further business, Mayor Mulhollem adjourned the meeting at 8:46 p.m.**
-
-

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Special Meeting - Minutes
Thursday, May 30, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Purvis
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Kim P. Batten, Town Administrator/Finance Director
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk
Joyce Lawhorn, Deputy Town Clerk

COUNCIL ABSENT:

Council Member Jackson

STAFF ABSENT:

Marcus Burrell, Town Attorney

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 5:15 p.m. at the Archer Lodge Town Park located at 2636 Castleberry Road, Archer Lodge, NC and declared a quorum present. Mayor Pro Tem Castleberry offered the invocation.

b) Pledge of Allegiance

The Boy Scouts led the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No changes or additions.

Moved by Council Member Wilson Seconded by Mayor Pro Tem Castleberry

Approved the Agenda

CARRIED UNANIMOUSLY

3. DISCUSSION AND POSSIBLE ACTION ITEMS:

3

a) Discussion and Possible Action of Approving a Resolution Affecting the Town Park

Mayor Mulhollem invited Mike Gordon to the front of the pavilion. Mayor Mulhollem read Resolution# AL-2024-05-30 and revealed sign naming it the Mike Gordon Pavilion. Pictures were taken of Mr. Gordon and Mayor Mulhollem. Mike Gordon shared a few words to express his thanks to the community for the honor of having the pavilion named after him.

The signed Resolution# AL2024-05-30 is attached below.
[Resolution# AL2024-05-30 Signed](#)

4. ADJOURNMENT:

a) Having no further business, Mayor Mulhollem called for a motion to adjourn.

Moved by Mayor Pro Tem Castleberry Seconded by Council Member Wilson

Meeting adjourned at 5:26 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**RESOLUTION NAMING THE PAVILION AT THE
ARCHER LODGE TOWN PARK IN HONOR OF
MICHAEL A. GORDON**

WHEREAS, the Town Council of the Town of Archer Lodge, North Carolina, wishes to pay tribute to the lifework and devotion of Michael A. Gordon, better known as Mike, to his community and to the Town of Archer Lodge; and

WHEREAS, Mr. Gordon has a lifelong dedication to the community, the White Oak Baptist Church, the Archer Lodge Fire Department, the Archer Lodge Community Center, the Archer Lodge Veterans’ Memorial Committee, the Town, and to his family and faith; and

WHEREAS, Mr. Gordon was instrumental in the incorporation process and worked tirelessly for the cause; and

WHEREAS, Mr. Gordon was an original member of the Archer Lodge Town Council and served as Mayor with honor and distinction from November 9, 2009 to February 4, 2018 and during this time encouraged the Council to set aside funds for a future Town park; and

WHEREAS, Mr. Gordon continued his service as the Archer Lodge Town Administrator, preparing for expansion of services while leading during a worldwide pandemic; and


WHEREAS, Mr. Gordon was active with the planning and development of property that would become the Archer Lodge Town Park; and

WHEREAS, Mr. Gordon continues to serve the community and the Town by volunteering his time and energy which epitomizes the heart of what is Archer Lodge; and


NOW, THEREFORE, BE IT RESOLVED by the Archer Lodge Town Council, while in a Special Meeting, declares that the Pavilion at the Archer Lodge Town Park located at 2636 Castleberry Road, Archer Lodge, NC shall henceforth be known as

“THE *Mike Gordon* PAVILION ”

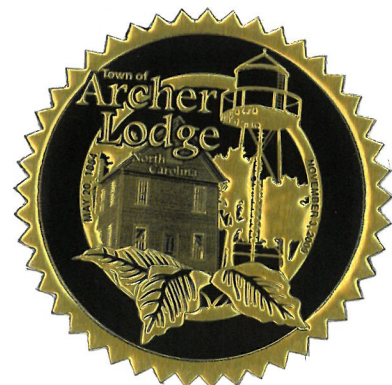
DULY ADOPTED BY UNANIMOUS VOTE THIS 30th DAY OF MAY 2024.



Matthew B. Mulhollem
Mayor

ATTEST:


Jenny Martin
Town Clerk





**Regular Council - Minutes
Monday, June 3, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Purvis
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Brandon Emory, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

Council Member Jackson

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No changes or additions.

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved the Agenda

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

a)

No public comments.

4. CONSENT AGENDA:

a) FLSA & Overtime Pay Provisions Policy

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved Consent Agenda

CARRIED UNANIMOUSLY

5. **PLANNING/ZONING REPORT:**

a) **Planning/Zoning Update**

Mr. Bryan Chadwick explained that the Town Planner, Jason Kress, will have a Planning/Zoning Report to present at the next Regular Council Meeting. He shared that Mr. Kress has been very busy and getting acclimated to his position.

b) **Code Enforcement Monthly Report**

Mr. Rodney Barbour explained the May 2024 Code Enforcement Report. He shared that he had opened one new case and that there have been 13 cases that have been abated. He explained that hearings are planned for several properties for the month of June. Discussion followed.

6. **PRESENTATION:**

6 - 21

a) **2024 Comprehensive Land Use Plan Update ~ Chad Meadows**

Chad Meadows presented the presentation below. His hopes is that this provides direction for the Council to decide how to move forward. Key take-aways from the survey included concerns regarding traffic, concerns of loss of character due to growth, residential development in general, concerns about the potential for commercial development for the area, and not having substantial support for sewer expansion. Discussion followed.

[Archer Lodge Comp Plan Survey Interpretation presentation 6-3-24](#)

7. **DISCUSSION AND POSSIBLE ACTION ITEMS:**

a) **Discussion and Possible Action of Amending the Town of Archer Lodge Code of Ordinances, Archer Lodge, NC, Chapter 30 - referenced as Unified Development Ordinance (UDO) Text Amendment#: AL2024-06-01**

Chad explained the Code of Ordinance amendment and shared the Archer Lodge Planning Board's recommendation. Discussion followed. Chad explained that there needs to be a public hearing before Council could vote, so no vote was held.

22

b) **Discussion and Possible Action of Approving a Resolution of Support for Capital Area Metropolitan Planning Organization (CAMPO) Recommendations Associated with the Southeast Area Study (SEAS) Update (Resolution# AL2024-06-03a)**

Mr. Bryan Chadwick explained the resolution and shared that a lot of this information was shared during the Planning Retreat in January 2024. Discussion followed.

Mayor Mulhollem called for a motion.

The signed Resolution# AL2024-06-03 is attached below.

Moved by Council Member Wilson Seconded by Mayor Pro Tem Castleberry

Approved the Resolution of Support for Capital Area Metropolitan Planning Organization (CAMPO) Recommendations Associated with the Southeast Area Study (SEAS) Update (Resolution# AL2024-06-03)

CARRIED UNANIMOUSLY

23 - 34

c) Discussion and Possible Action of Approving Updated Memorandum of Understanding (MOU) with Capital Area Metropolitan Planning Organization (CAMPO) to include Adding Newest Members of the Town of Lillington, Town of Coats and Chatham County

Mr. Bryan Chadwick explained that this was an updated MOU for the purpose of including new members.

Mayor Mulhollem called for a motion.

The signed MOU with CAMPO to include Adding Newest Members of the Town of Lillington, Town of Coats, and Chatham County is attached below.

Moved by Council Member Wilson Seconded by Mayor Pro Tem Castleberry
Approved Updated Memorandum of Understanding (MOU) with Capital Area Metropolitan Planning Organization (CAMPO) to include Adding Newest Members of the Town of Lillington, Town of Coats and Chatham County

CARRIED UNANIMOUSLY

[MOU with CAMPO to include Adding Newest Members Signed](#)

d) Discussion and Possible Action of Approving the Archer Lodge Parking Plaza Concept

Mr. Bryan Chadwick explained the Parking Plaza concept to Council. This proposal included removing some trees and adding food truck access. This would allow for more parking and less maintenance to the grounds. Discussion followed. Council requested to see more options.

e) Discussion and Possible Action of Approving the Updated Memorandum of Understanding (MOU) Between the Town of Archer Lodge and Johnston County Little League

Mr. Bryan Chadwick explained the changes that were made to the MOU. These changes included that the Town will set certain guidelines for Johnston County Little League (JCLL) to abide by in regards to scheduling. JCLL is to be in charge of all things regarding their ALL STARS. There was also clarification for the part-time employees and the scoreboard. An update will be provided at the Special Meeting on the 24th.

8. TOWN ATTORNEY'S REPORT:

a) Town Attorney Marcus Burrell had no remarks.

9. HUMAN RESOURCES OFFICER/TOWN CLERK'S REPORT:

a) Ms. Jenny Martin explained the retiree health insurance plan information and research that she conducted. She reached out to one of our current providers to get a quote for the retirement health insurance plan. When looking into other government agencies that offer this benefit, she was able to get information back from 16 other agencies. She described the flexibility of this benefit and that the Town would be able to make it their own.

10. PARK AND RECREATION DIRECTOR'S REPORT:

- a) **Mr. Chris Allen explained the success in the second season partnering with JCLL. He also explained that he has met with Johnston County Athletic Association to iron out the schedule for the rest of the year and cohesive registration and games. He expressed his hope to be offering volleyball in the fall. Mr. Allen discussed the rentals expected for the week and weekend. He went on to explain that people are coming in to rent here due to the benefits they receive by renting here and the fees. Mr. Allen explained his plan to hold popsicles in the park every other week through the summer. He recapped the softball clinic that had 22 participants and his excitement for the basketball clinic. He mentioned that there were only 2 games left with the baseball leagues.**

11. MAYOR'S REPORT:

- a) **Mayor Mulhollem expressed his appreciation to everyone for their efforts in celebrating Mr. Mike Gordon last week.**

12. COUNCIL MEMBERS' REMARKS:

- a) **Council Member Wilson had no remarks.**
- b) **Council Member Purvis had no remarks.**
- c) **Mayor Pro Tem Castleberry had no remarks.**
- d) **Council Member Bruton had no remarks.**

13. BUDGET PRESENTATION:

- a) **Proposed Annual Budget Ordinance Presentation for Fiscal Year Ending June 30, 2025 ~
Bryan Chadwick, Budget Officer/Town Administrator
Kim Batten, Assistant Town Administrator/Finance Officer**

Mr. Bryan Chadwick read over the Budget Message. Discussion followed. Next steps of action was to set up a time to meet for the Public Hearing which was set to the 24th.

14. ADJOURNMENT:

- a) **Having no further business, Mayor Mulhollem called for a motion to adjourn.**

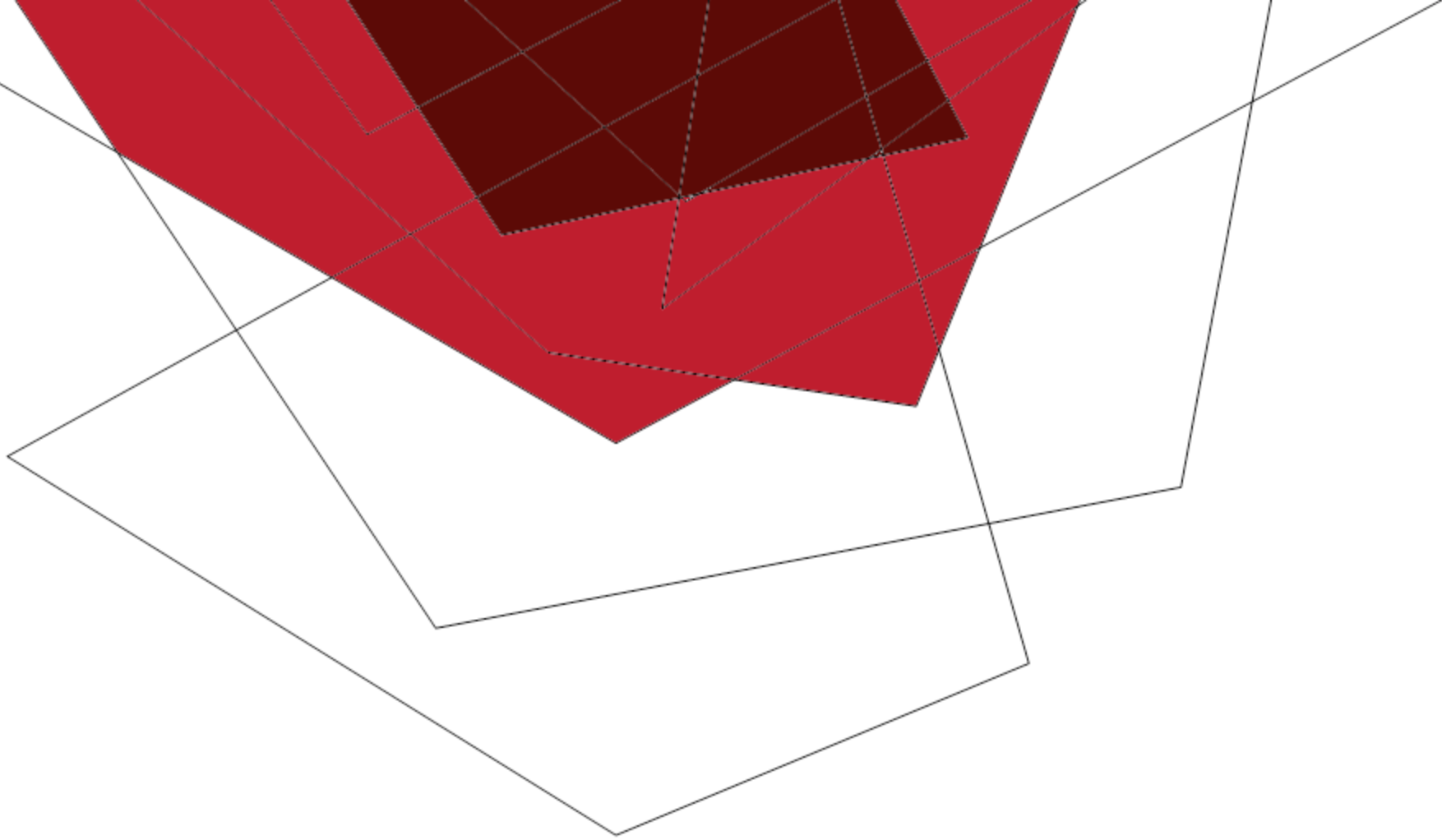
Moved by Council Member Purvis Seconded by Council Member Wilson

Meeting adjourned at 9:42 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



ARCHER LODGE

Land Use Plan Update

Citizen Survey Results Interpretation 6-3-24

1. EXISTING CONDITIONS REPORT
2. PUBLIC FORUM ONE
- 3. CITIZEN SURVEY**
4. VISION & GOALS
5. PUBLIC FORUM TWO
6. DRAFT PLAN/MAP
7. ADOPTION PROCESS



SURVEY NOTICE – 3.21.24

PLEASE FILL OUT YOUR ARCHER LODGE CITIZEN SURVEY!!!



Growth is coming to Archer Lodge!
Help us update Archer Lodge's
Land Use Plan to guide the Town's
future.



<https://www.surveymonkey.com/r/LandUseArcherLodge>

Thank you for your participation!

SURVEY FORM 3.21.24 THROUGH 4.1.24



Town of
Archer Lodge
Land Use Plan Update
Survey

THANK YOU FOR TAKING THE LAND USE PLAN UPDATE SURVEY!

The Town of Archer Lodge, like most towns in North Carolina, maintains a Land Use Plan to help guide decisions about growth and development. The Town adopted its current Land Use Plan 5 years ago, and a lot has happened since then. Even more change is on the horizon as the last two sections of the NC 540 Outer Loop will open in the next few years. The recent growth in Archer Lodge and the anticipated growth in coming years make it important for the Town to review and update its Land Use Plan for the future.

The Town's current Land Use Plan can be reviewed at: <https://tinyurl.com/ArcherLodgePlan>

This survey includes a series of questions for Town residents and business owners to guide the work of updating the Land Use Plan. Your input will help the Town craft policies that preserve and enhance Archer Lodge and plan for the future. This is not a scientific survey - it will not measure and calculate your desires. Instead, we've designed this to be more of a friendly check-in to help us understand what is or is not important to folks who live and work in Archer Lodge.

Some of the questions have boxes to select, others are more open-ended with a place for you to write your answers. We have provided space at the end of each question for additional thoughts or other suggestions. You can complete this survey online or via paper copy (available at Town Hall). Online responses may be submitted at: <https://www.surveymonkey.com/r/LandUseArcherLodge>

Please respond to this survey by Friday, March 29, 2024.

Thank you so much for sharing your thoughts about Archer Lodge's future and its Land Use Plan!

SUMMARY REPORT 5.4.24



ARCHER LODGE LAND USE PLAN UPDATE

Public Forum 1 / Survey Results Summary Report 4.25.24

Archer Lodge Land Use Plan Update Survey Results Summary

The overwhelming response from those who completed the survey was that Archer Lodge should preserve its small-town identity and tight-knit community. The responses identified traffic as the major concern and an indication that the Town needs to respond to development pressure.

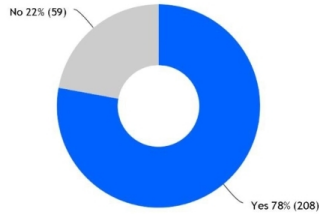
In general, residents were more accepting of increased costs and fees for developers to help mitigate and control the impacts of new development. Increased taxes were by far the least favored mechanism to mitigate the impacts of growth.

SECTION 1: GENERAL QUESTIONS

Questions 1-9 are the general questions that can be applied to the broad direction of the Town. The answers to these questions reveal what people like about Archer Lodge and generally how they would advise Town leaders to approach issues.

Q1 Do you live in the Town of Archer Lodge?

Answered: 267 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	78%	208
No	22%	59
TOTAL		267



ARCHER LODGE LAND USE PLAN UPDATE

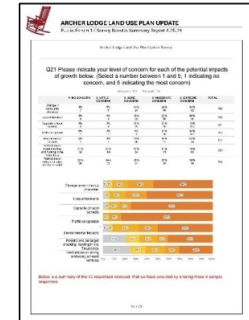
Citizen Survey Results Interpretation May 26, 2024

As part of the Town's current Land Use Plan update effort, the Town administered a citizen survey and gathered public feedback in March and April of 2024. An earlier document titled "Archer Lodge Public Forum One and Survey Results Summary" provides a summary of the results of the citizen survey. This document was presented to the Town Council on May 5, 2024.

In total, 267 people took the survey. 78% of those who took the survey lived in town, but a small percentage (22%) did not. Of the town residents, there was an even split of residents who have lived in the town of 10 or less years and the other half for over 10 years.

The Archer Lodge Land Use Plan Citizen Survey asked questions that focused on six main themes:

1. Town values
2. Housing
3. Transportation
4. Water and sewer
5. Commercial development
6. Controlling growth and expanding boundaries



Each theme in the survey was selected to capture perspectives on critical issues related to growth, development, and town character.

Generally speaking, the survey clarified that Archer Lodge residents are concerned about traffic congestion and loss of community character due to growth. In response to these concerns, survey respondents indicated a desire to limit new residential development and ensure that new residential development consisted entirely of single-family detached development. Likewise, there was concern on the part of residents that additional commercial development would further exacerbate traffic congestion concerns and help accelerate loss of community character. There was also little support for the extension of public sewer, likely based on similar concerns about additional growth and growth's impacts on established rural community character. Survey respondents did support the idea of expanded planning control, through the establishment of new extraterritorial jurisdiction beyond the current corporate limits, likely based on the rationale that the extension of Town planning authority into these areas would help slow or control growth and thus delay traffic congestion or continued loss of community character.

This document explores the responses related to the six main themes and provides some additional thoughts for the Town's consideration. While the citizen survey does give some general parameters and direction for the land use plan update, it is important to remember that the number of survey respondents is low (267 people) relative to the Town's population (4,800 people), and that the survey results should not be used to infer how the balance of Town residents perceive the issues. There are also some important subtleties in the data and potential outcomes that also need consideration. The following sections will go into more detail on some of these issues.

The next step in the process is the refinement of the Town's current vision statement and the articulation of new land use and development goals for the future. This interpretation document will help crystallize some of the thinking about potential goals and methods for achieving the Town's objectives.

KEY FINDINGS.

CONCERN OVER TRAFFIC
CONGESTION

LOSS OF COMMUNITY CHARACTER
DUE TO GROWTH

LIMIT NEW RESIDENTIAL
DEVELOPMENT

SINGLE-FAMILY DETACHED HOMES
ONLY

LIMIT NEW COMMERCIAL
DEVELOPMENT

NO SUPPORT FOR PUBLIC SEWER
EXTENSION

SUPPORT FOR FTI EXTENSION

THINGS TO REMEMBER...

These numbers should not be used to infer the entire community's sentiment

- Response rates were low (267 out of 4,800 residents took the survey) (most questions had about 150 responses)
- Respondents were self-selected (this is not a random sample)





ARCHER LODGE LAND USE PLAN UPDATE

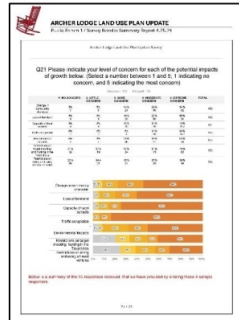
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KEY THEMES

1. TOWN VALUES

2. HOUSING

3. TRANSPORTATION

4. WATER & SEWER

5. COMMERCIAL DEVELOPMENT

6. CONTROLLING GROWTH & EXPANDING BOUNDARIES

1. TOWN VALUES AND VISION



“Small-town feel”

“Authenticity is threatened by growth in and around Town”

“Manage growth to address traffic congestion”

IDEAS TO CONSIDER:

- Describe Community Character
(use, density, building placement, street configuration, type(s) of open space)
- Establish Growth Management Goals
(control location, rate of growth)

2. HOUSING



“Opposed to more residential”
“Limit new residential to just single-family detached dwellings”

- Limiting supply increases prices
- Increasing service costs are borne by same # of taxpayers
- Low-density residential growth absorbs more open space and spreads congestion
- Limited capacity to address changes in residential preferences/needs

2. HOUSING (CONTINUED)



IDEAS TO CONSIDER:

- **Consider a Housing Study**
(what are current needs, what will be needed in 20 years?)
- **“Lean in” to Gentle Density**
(permit more ADUs, small home/small lot development, conservation subdivisions, live/work units)
- **Modify Zoning Districts**
(Remove multi-family district, remove planned development district, add a conditional residential district)
- **Other Thoughts?**

3. TRANSPORTATION

“Limit traffic congestion”

“Raise fees for new development”

But the Town has very little control

IDEAS TO CONSIDER:

- Add New Street Standards
(Street connectivity index, continuation/extension, driveway access limits in new subdivisions)
- Implement Bike & Pedestrian Plan
- Consider new Requirements for Greenways



4. COMMERCIAL DEVELOPMENT



“Limit new commercial development”

This could worsen cross-town traffic

There may be support for small-scale, neighborhood-serving commercial (urgent care, bank, small restaurant)

IDEAS TO CONSIDER:

- Define Small-Scale Commercial
- Consider a Village Center
(located closer to sewer resources)
- Consolidate Commercial Districts

5. WATER & SEWER



“Sewer is expensive”

BUT

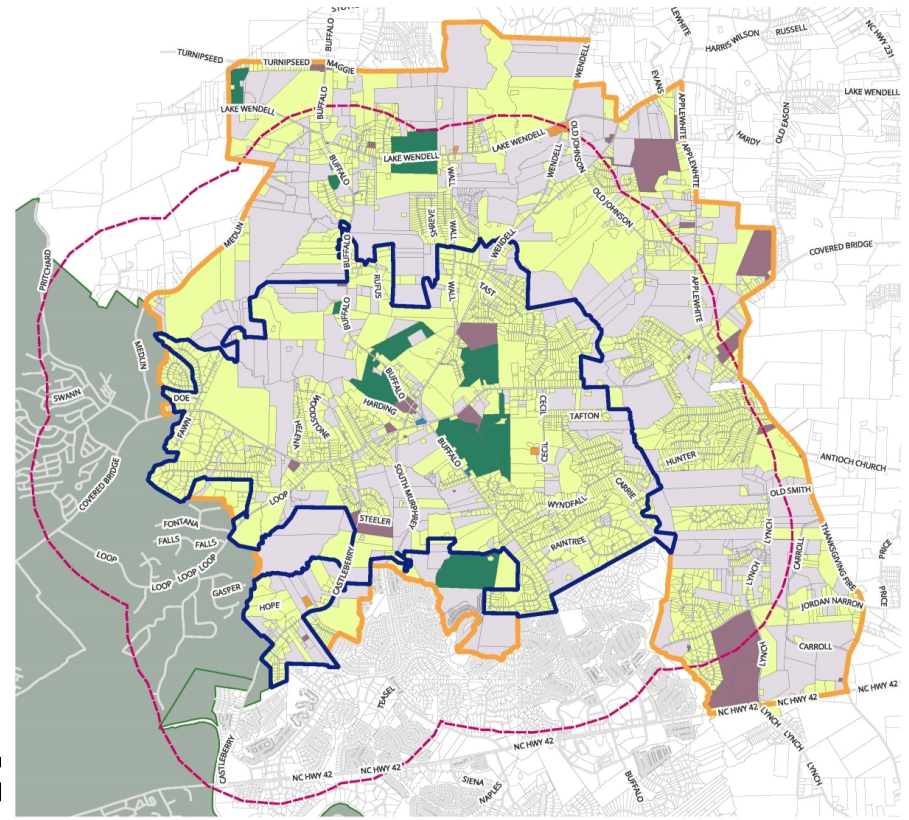
“Sewer could help control growth”

Having commercial means having sewer

IDEAS TO CONSIDER:

- **Participate in Regional Sewer Study**
(recognize that this approach may interrupt tax growth and planning control since annexation not required)
- **Explore Partnerships with Neighbors**
(Town pays to bring sewer to Town limits, developers pay the rest; Establish a limited sewer service area)

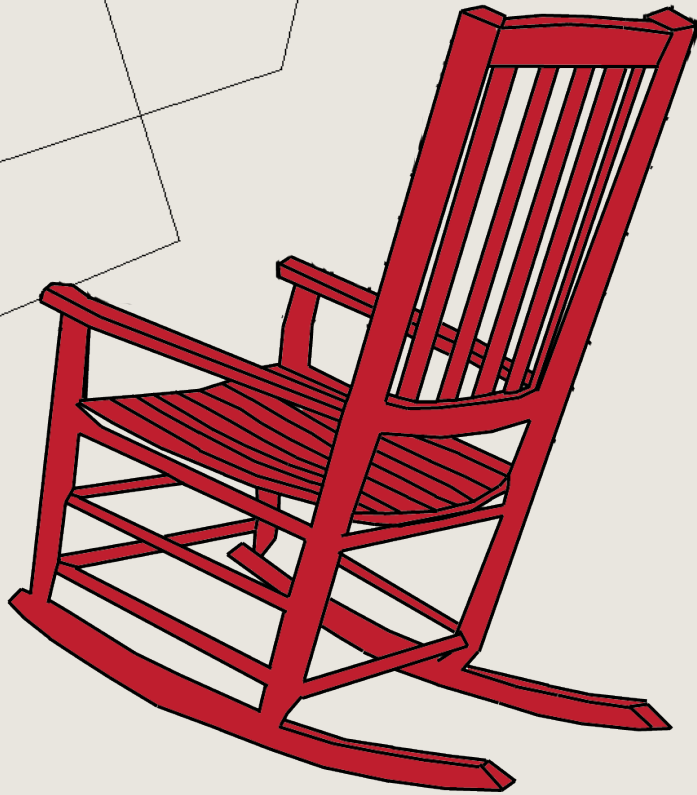
6. BOUNDARIES



IDEAS TO CONSIDER

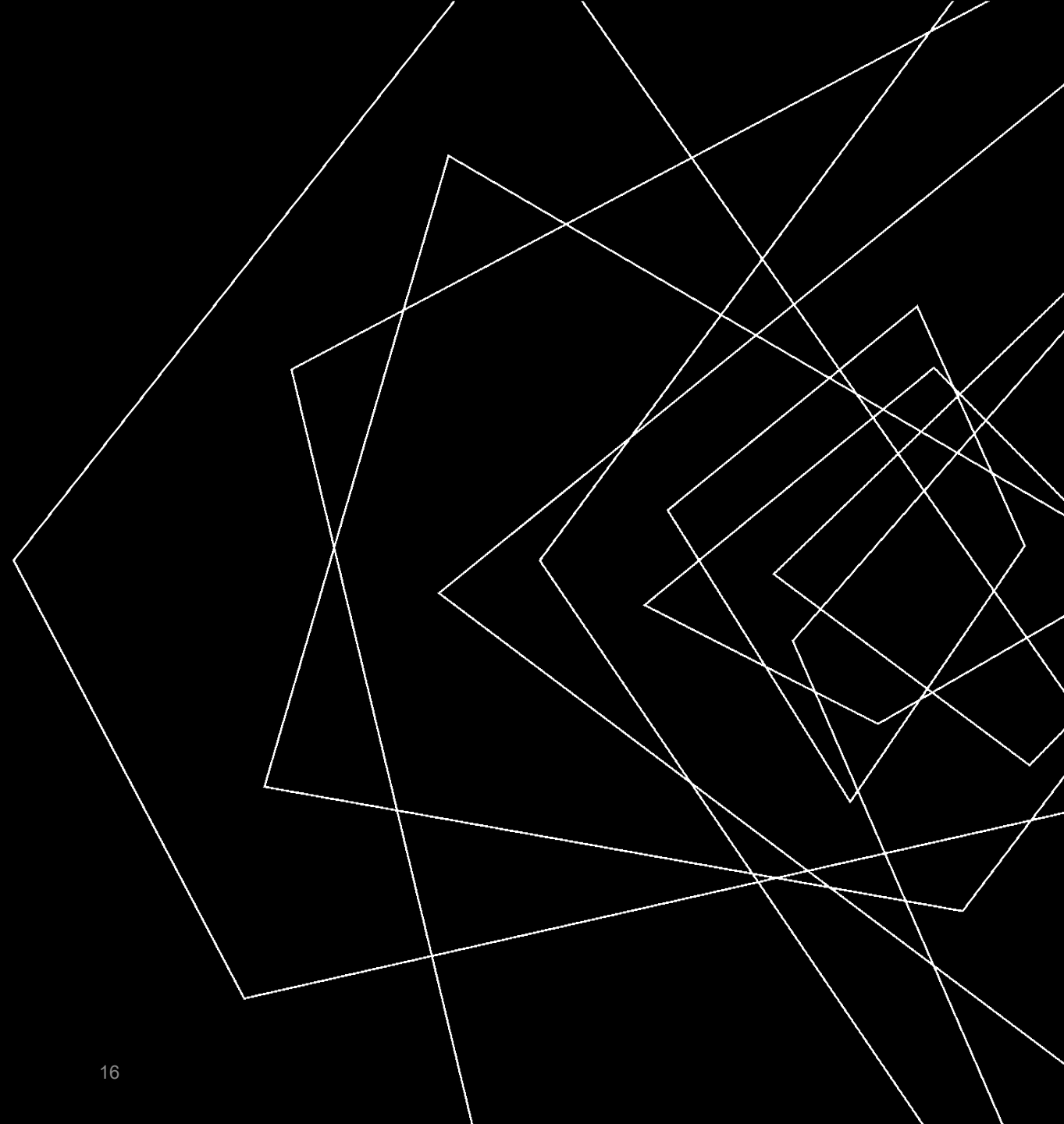
- Continue to include potential ETJ Area in Plan
- Invite Residents to Participate
- Commence an ETJ Cost/Benefit Analysis

OTHER IDEAS?



- DEFINE COMMUNITY CHARACTER
- ESTABLISH GROWTH MANAGEMENT GOALS
- HOUSING STUDY
- LEAN IN TO GENTLE DENSITY
- MODIFY ZONING (RES. & COM.)
- NEW STREET STANDARDS
- IMPLEMENT BIKE/PED PLAN
- NEW GREENWAY REQUIREMENTS
- DEFINE SMALL-SCALE COMMERCIAL
- CONSIDER A VILLAGE CENTER
- REGIONAL SEWER STUDY
- CONSIDER SEWER PARTNERSHIP
- REACH OUT TO ETJ RESIDENTS
- ETJ COST/BENEFIT STUDY

NEXT STEPS:
PUBLIC FORUM 2 –
COMMUNITY VISION
PLAN GOAL
DISCUSSION
AFTER JULY 4?



RESOLUTION OF THE ARCHER LODGE TOWN COUNCIL SUPPORTING THE CAMPO RECOMMENDATIONS ASSOCIATED WITH THE SOUTHEAST AREA STUDY UPDATE

WHEREAS – The Capital Area Metropolitan Planning Organization maintains responsibility for regional transportation planning in Wake and portions of Chatham, Franklin, Granville, Harnett, and Johnston Counties; and


WHEREAS –The Capital Area Metropolitan Planning Organization has conducted a two-year study that includes Archer Lodge, Benson, Clayton, Four Oaks, Garner, Kenly, Micro, Pine Level, Selma, Smithfield, Wilson’s Mills and portions of Raleigh, Wake and Johnston Counties; and

WHEREAS – The study outcomes will result in recommended improvements for the roadway, the bicycle and pedestrian, and transit network, and an implementation strategy that recommends short-term, mid-term and long-term improvements; and

WHEREAS- Public engagement was conducted within the two phases of the Southeast Area Study Update process, and was completed in the Spring of 2024; and

WHEREAS -The recommendations from the Southeast Area Study Update will be incorporated into the 2055 Metropolitan Transportation Plan (MTP).

BE IT THEREFORE RESOLVED that the Archer Lodge Town Council supports the recommendations associated with the Southeast Area Study Update. Signed this 3rd day of June, 2024.


Local Signature


Local Attestation

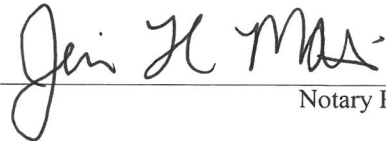
County of Johnston
State of North Carolina

I, Jennifer H. Martin, a Notary Public for said County and State, do hereby certify that Mayor, Matthew B. Mulhollem, personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

Witness my hand and official seal, this the 3rd day of June, 2024.



My commission expires October 6, 2024.


Notary Public

**NORTH CAROLINA
CAPITAL AREA METROPOLITAN PLANNING ORGANIZATION**

**MEMORANDUM OF UNDERSTANDING
BETWEEN**

**THE GOVERNOR OF THE STATE OF NORTH CAROLINA,
TOWN OF ANGIER, TOWN OF APEX, TOWN OF ARCHER LODGE, TOWN OF
BUNN, TOWN OF CARY, TOWN OF COATS, TOWN OF CLAYTON, CITY OF
CREEDMOOR, TOWN OF FRANKLINTON, TOWN OF FUQUAY-VARINA, TOWN
OF GARNER, TOWN OF HOLLY SPRINGS, TOWN OF KNIGHTDALE, TOWN OF
LILLINGTON, TOWN OF MORRISVILLE, CITY OF RALEIGH, TOWN OF
ROLESVILLE, TOWN OF WAKE FOREST, TOWN OF WENDELL, TOWN OF
YOUNGSVILLE, TOWN OF ZEBULON, COUNTY OF CHATHAM, COUNTY OF
FRANKLIN, COUNTY OF GRANVILLE, COUNTY OF HARNETT, COUNTY OF
JOHNSTON, COUNTY OF WAKE, TRIANGLE TRANSIT AUTHORITY, AND THE
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
(Hereinafter referred to as the Municipalities, the Agencies, the Counties and the State)**

**IN COOPERATION WITH
THE UNITED STATES DEPARTMENT OF TRANSPORTATION,**

Agreement No. 2024-04-17

WITNESSETH THAT

WHEREAS, Chapter 136, Article 3A, Section 136.66.2(d) provides that:

"For MPOs, either the MPO or the Department of Transportation may propose changes in the plan at any time by giving notice to the other party, but no change shall be effective until it is adopted by both the Department of Transportation and the MPO."; and

WHEREAS, Section 134(a) of Title 23 United States Code states:

"It is in the national interest to encourage and promote the development of transportation systems embracing various modes of transportation in a manner which will efficiently maximize mobility of people and goods within and through urbanized areas and minimize transportation-related fuel consumption and air pollution. To accomplish this objective, metropolitan planning organizations, in cooperation with the State, shall develop transportation plans and programs for urbanized areas of the State. Such plans and programs shall provide for the development of transportation facilities (including pedestrian walkways and bicycle transportation facilities)

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

which will function as an intermodal transportation system for the State, the metropolitan areas, and the Nation. The process for developing such plans and programs shall provide for consideration of all modes of transportation and shall be continuing, cooperative, and comprehensive to the degree appropriate, based on the complexity of the transportation problems."; and

WHEREAS, Section 134(c) of Title 23 United States Code states:

Development of long-range plans and TIPs.— To accomplish the objectives in subsection (a), metropolitan planning organizations designated under subsection (d), in cooperation with the State and public transportation operators, shall develop long-range transportation plans and transportation improvement programs for metropolitan planning areas of the State; and

WHEREAS, Chapter 136, Article 3A, 66.2(a) of the General Statutes of North Carolina require that:

"Each MPO, with cooperation of the Department of Transportation, shall develop a comprehensive transportation plan in accordance with 23 U.S.C. § 134. In addition, an MPO may include projects in its transportation plan that are not included in a financially constrained plan or are anticipated to be needed beyond the horizon year as required by 23 U.S.C. § 134. For municipalities located within an MPO, the development of a comprehensive transportation plan will take place through the metropolitan planning organization. For purposes of transportation planning and programming, the MPO shall represent the municipality's interests to the Department of Transportation."; and,

WHEREAS, Chapter 136, Article 3A, 66.2(b) provides that:

"After completion and analysis of the plan, the plan shall be adopted by both the governing body of the municipality or MPO and the Department of Transportation as the basis for future transportation improvements in and around the municipality or within the MPO. The governing body of the municipality and the Department of Transportation shall reach agreement as to which of the existing and proposed streets and highways included in the adopted plan will be a part of the State highway system and which streets will be a part of the municipal street system. As used in this Article, the State highway system shall mean both the primary highway system of the State and the secondary road system of the State within municipalities."; and,

WHEREAS, a transportation planning process includes the operational procedures and working arrangements by which short and long-range transportation plans are soundly conceived and developed and continuously evaluated in a manner that will:

1. Assist governing bodies and official agencies in determining courses of action and in formulating attainable capital improvement programs in anticipation of community needs; and,
2. Guide private individuals and groups in planning their decisions which can be important factors in the pattern of future development and redevelopment of the area; and,

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

WHEREAS, it is the desire of these agencies that a continuing, cooperative, and comprehensive transportation planning process as set forth in a Memorandum of Understanding dated January 28, 1993 comply with Title 23 U.S.C. Section 134; and any subsequent amendments to that statute, and any implementing regulations; Title 49 U.S.C. Chapter 53 and any subsequent amendments to these statutes and any implementing regulations; and the Clean Air Act of 1970, as amended, [42 U.S.C.7504 and 7506].

NOW THEREFORE, the following **Memorandum of Understanding** is made:

Section I. Membership

It is hereby agreed that the Municipalities, the agencies, the Counties and the State in cooperation with the United States Department of Transportation, will participate in a continuing, cooperative and comprehensive (“3-C”) transportation planning process with responsibilities and undertakings as related in the following paragraphs:

1. The **N. C. Capital Area Metropolitan Planning Area** (as defined by the Metropolitan Area Boundary, also known as the Planning Area Boundary) will be all of Wake County and parts of Chatham, Franklin, Granville, Harnett, and Johnston Counties.
2. The **N. C. Capital Area Metropolitan Planning Organization (MPO)** shall include the local governments of the Municipalities and the Counties, the North Carolina Department of Transportation, an **Executive Board** hereinafter defined, a **Technical Coordinating Committee** hereinafter defined, and the various agencies and units of local, regional, and state government participating in the transportation planning for the area.
3. The **Urbanized Area Boundary** and the **Metropolitan Area Boundary** shall be periodically reviewed and revised in light of new developments and basic data projections.
4. The continuing transportation planning process will be a cooperative one reflective of and responsive to the programs of the North Carolina Department of Transportation, and to the comprehensive plans for growth and development of the Municipalities and the Counties in the Triangle Region with attention being given to cooperative planning with the neighboring metropolitan and rural planning organizations.
5. The continuing transportation planning process will be in accordance with the intent, procedures and programs of Title VI of the Civil Rights Act of 1964, as amended.
6. The continuing transportation planning process will be in accordance with the intent, procedures, and programs of the Clean Air Act of 1970, as amended.
7. Transportation policy decisions within the planning area are the shared responsibility of the North Carolina Board of Transportation, the Executive Board and the governing bodies of the participating local governments.

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

8. Transportation plans and programs and land use policies and programs having regional impacts will be coordinated with the applicable regional Councils of Governments.
9. **An Executive Board is hereby established** with the responsibility for cooperative transportation planning decision making for the MPO. The **Executive Board** shall have the responsibility for keeping the policy boards of the participating local governments informed of the status and requirements of the transportation planning process; for assisting in the dissemination and clarification of the decisions and policies of the policy boards; for providing opportunities for citizen participation in the transportation planning process; and all other duties and responsibilities customary for a governing board of a public authority.

The **Executive Board** will be responsible for carrying out the provisions of 23 U.S.C. Section 134 and Title 49 U.S.C. Chapter 53; and 42 U.S.C.; including, but not necessarily limited to:

- a. Establishment of goals and objectives for the transportation planning process.
- b. Review and approval of a **Prospectus** for transportation planning which defines work tasks and responsibilities for the various agencies participating in the transportation planning process;
- c. Review and approval of changes to the **Metropolitan Area Boundary** as well as review and recommendation for changes to the **National Highway System**;
- d. Review and approval of the transportation **Unified Planning Work Program**;
- e. Review and approval of the adopted **Comprehensive and Metropolitan Transportation Plans**. As specified in General Statutes Section 136-66.2(a), the Comprehensive Transportation Plan shall include the projects in the Metropolitan Area's Transportation Plan as well as projects that are not included in the financially constrained plan or are anticipated to be needed beyond the horizon year as required by 23 U.S.C. Section 134. As specified in General Statutes Section 136-66.2(d) certain revisions to the **Comprehensive Transportation Plan** may be required to be jointly approved by the North Carolina Department of Transportation;
- f. Review and approval of the MPO's **Transportation Improvement Program** for multimodal capital and operating expenditures ensuring coordination between local and State capital improvement and operating programs. As specified in 23 U.S.C. Section 134(k), all federally funded projects carried out within the boundaries of a metropolitan planning area serving a transportation management area (excluding projects carried out on the National Highway System) shall be selected for implementation from the approved TIP by the

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

- metropolitan planning organization designated for the area in consultation with the State and any affected public transportation operator;
- g. Review and approval of planning procedures for air quality conformity and review and approval of air quality conformity determination for projects, programs, and plans;
 - h. Review and approval of a Congestion Management Process;
 - i. Review and approval of the distribution and oversight of federal funds designated for the Raleigh Urbanized Area under the provisions of IIJA and any other subsequent Transportation Authorizations;
 - j. Review and approval of a policy for public involvement for the MPO;
 - k. Review and approval of an agreement between the MPO, the State, and public transportation operators serving the Metropolitan Planning Area that defines mutual responsibilities for carrying out the metropolitan planning process in accordance with 23 C.F.R. 450
 - l. Development and approval of committee by-laws for the purpose of establishing operating policies and procedures;
 - m. Oversight of the MPO Staff;
 - n. Revisions to membership of Technical Coordinating Committee as defined herein;
 - o. Review and approval of cooperative agreements with other transportation organizations, transportation providers, counties, and municipalities.

The membership of the **Executive Board** shall include:

- One member of the Angier Town Board of Commissioners
- One member of the Apex Town Council
- One member of the Archer Lodge Town Council
- One member of the Bunn Town Council
- One member of the Cary Town Council
- One member of the Clayton Town Council
- One Member of the Coats Board of Commissioners
- One member of the Creedmoor Board of Commissioners
- One member of the Franklinton Town Board of Commissioners
- One member of the Fuquay-Varina Town Board of Commissioners
- One member of the Garner Town Council

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

- One member of the Holly Springs Town Council
- One member of the Knightdale Town Council
- One member of the Lillington Board of Commissioners
- One member of the Morrisville Town Council
- One member of the Raleigh City Council
- One member of the Rolesville Town Board of Commissioners
- One member of the Wake Forest Town Board of Commissioners
- One member of the Wendell Town Board of Commissioners
- One member of the Youngsville Town Board of Commissioners
- One member of the Zebulon Town Board of Commissioners
- One member of the Chatham County Board of Commissioners
- One member of the Franklin County Board of Commissioners
- One member of the Granville County Board of Commissioners
- One member of the Harnett County Board of Commissioners
- One member of the Johnston County Board of Commissioners
- One member of the Wake County Board of Commissioners
- Four members of the North Carolina Board of Transportation representing the Highway Divisions (currently 4, 5, 6 and 8) within the Metropolitan Planning Area
- One member of the Research Triangle Regional Public Transportation Authority Board of Trustees; and
- The Division Administrator of the Federal Highway Administration or his or her representative who shall serve as an advisory, non-voting member.
- The Regional Administrator of the Federal Transit Administration or his or her representative, who shall serve as an advisory, non-voting member.
- The Regional Administrator of the Federal Rail Administration or his or her representative, who shall serve as an advisory, non-voting member.

Municipal and county public transit providers shall be represented on the Executive Board through their respective municipal and county local government board members.

Voting representatives of the Municipalities and the Counties shall be designated by their respective governing boards. Requirements for voting, quorums, and membership in good standing shall be included in the adopted bylaws of the Executive Board. Weighted voting shall be applied as invoked by any voting member of the Executive Board. In the instance of a weighted vote, each member government shall be apportioned weighted voting based on the most recent certified North Carolina Population Estimates for Municipalities and Counties utilizing a vote weighting formula of one vote for each 10,000 of population, or

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

portion thereof. Other voting agencies without population-based representation on the Executive Board shall vote in accordance with the most recent voting schedule. The most recent voting schedule will be maintained by the CAMPO staff and updated with the most recent certified North Carolina Population Estimates for Municipalities and Counties.

At the invitation of the **Executive Board**, other local, regional, State or Federal agencies impacting transportation within the planning area may serve as non-voting members of the **Executive Board**.

As established in its adopted bylaws, the **Executive Board** shall meet as deemed appropriate and shall elect officers with the responsibility for coordination of the committee's activities. A member of the MPO staff will serve as secretary to the Committee.

As established in its adopted bylaws, the Executive Board may create an executive committee and/or subcommittees to carry out its responsibilities.

10. **A Technical Coordinating Committee (TCC) shall be established** with the responsibility of general review, guidance and coordination of the transportation planning process for the planning area and with the responsibility for making recommendations to the Executive Board and to other entities designated by the Executive Board regarding any necessary actions relating to the continuing transportation planning process. The TCC shall be responsible for development, review and recommendations of the **Prospectus, Unified Planning Work Program, Transportation Improvement Program, Metropolitan Area Boundary, Urbanized Area Boundary, and National Highway System**, for revisions to the **Transportation Plan**, for planning citizen participation and for documenting reports of the transportation study.

Membership of Technical Coordinating Committee (TCC) shall include technical representatives from local, regional and State governmental agencies; as well as major modal transportation providers directly related to and concerned with the transportation planning process for the planning area. Each member agency's representative(s) shall be designated by the chief administrative officer of that agency. Departments or divisions within local and state agencies that should be represented on the TCC include, but are not limited to, those responsible for transportation planning, land use planning, transportation operations, public works and construction, engineering, public transportation, environmental conservation and planning, bicycle and pedestrian planning, and economic development. The voting membership shall include, at a minimum, representation from the following agencies/organizations, with specific numbers of members from each agency/organization outlined in the Technical Coordinating Committee's adopted bylaws:

- Town of Angier
- Town of Apex
- Town of Archer Lodge

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

- Town of Bunn
- Town of Cary
- Town of Clayton
- Town of Coats
- City of Creedmoor
- Town of Franklinton
- Town of Fuquay-Varina
- Town of Garner
- Town of Holly Springs
- Town of Knightdale
- Town of Lillington
- Town of Morrisville
- City of Raleigh
- Town of Rolesville
- Town of Wake Forest
- Town of Wendell
- Town of Youngsville
- Town of Zebulon
- County of Chatham
- County of Franklin
- County of Granville
- County of Harnett
- County of Johnston
- County of Wake
- Central Pines Regional Council
- Capital Area Transit
- Cary Transit
- Raleigh-Durham Airport Authority
- Research Triangle Transit Regional Public Transportation Authority

- North Carolina Department of Transportation
- Rural Transit Systems Serving Franklin , Granville, Harnett, Johnston and Wake Counties
- North Carolina State University
- Research Triangle Foundation
- Triangle North Executive Airport

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

The host agency's membership shall not include members of the MPO staff.

In addition to voting membership, the TCC shall invite officials responsible for other types of planning activities that are affected by transportation in the area (including State and local planned growth, economic development, environmental protection, airport operations, and freight movements) to coordinate their planning process, to the maximum extent practicable, with MPO planning activities. Such organizations and agencies may include:

- a. The Federal Highway Administration
 - b. The Federal Transit Administration
 - c. The Federal Rail Administration
 - d. The U.S. Army Corps of Engineers
 - e. The U.S. Environmental Protection Agency
 - f. The U.S. Fish and Wildlife Service
 - g. The N.C. Department of Cultural Resources
 - h. The N.C. Department of Commerce
 - i. The U.S. Department of Housing and Urban Development
 - j. The N.C. Railroad Company
 - k. The N.C. Trucking Association
 - l. The N.C. Motorcoach Association
 - m. Regional Transportation Alliance
11. The Technical Coordinating Committee shall operate as determined by its adopted bylaws. Any agency not listed above which wishes representation on the TCC may request such representation for consideration under the adopted bylaws of the TCC. As established in its adopted bylaws, the TCC may create an executive committee and/or subcommittees to carry out its responsibilities.
 12. The governing boards of the Municipalities and the Counties and the North Carolina Board of Transportation shall serve as the primary means for citizen input to the continuing transportation planning process. Citizen involvement will also be obtained through procedures outlined in the MPO's policy for public participation and through various special studies and projects undertaken by the MPO.

The Executive Board should also provide opportunities for citizen participation in the transportation planning process.

Section II. Responsibilities

It is further agreed that the subscribing agencies will have the following responsibilities, these responsibilities being those most logically assumed by the several agencies:

The Municipalities and the Counties

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

The Municipalities and the Counties will assist in the transportation planning process by providing assistance, data and inventories in accordance with the Prospectus. The Municipalities and the Counties shall coordinate zoning and subdivision approval within their respective jurisdictions in accordance with the adopted Metropolitan Transportation Plan. Additionally, the a host agency, as designated by the Executive Board will serve as the **Lead Planning Agency** for the MPO. Services provided by the Lead Planning Agency on behalf of the MPO will be governed by mutual agreement(s).

The Municipalities and the Counties will participate in funding the portion of the costs of the MPO's work program not covered by federal or state funding (minimum 20% match of actual annual expenditures) as approved by the Executive Board. The portion to be paid by each Municipal and County member government will be based upon its pro rata share of population within the MPO Planning Area, utilizing the most recent certified North Carolina Office of State Planning municipal and county population estimates. In addition, MPO members may also voluntarily contribute additional funds for other purposes such as to participate in funding the costs of special studies, or other specialized services as mutually agreed upon.

Failure to pay the approved share of costs shall invalidate the MPO's Unified Planning Work Program and annual MPO self-certification as required by 23 CFR 450. Failure to certify shall result in the withholding of transportation project funds to the metropolitan planning area in accordance with federal law. In order to avoid this, the Executive Board shall amend the Unified Planning Work Program.

The municipalities and the counties receiving federal transportation funding designated for the Urbanized Areas within the MPO Planning Area as approved by the Executive Board through the Unified Planning Work Program shall comply with adopted reporting and oversight procedures.

North Carolina Department of Transportation

The Department will assist in the transportation planning process by providing planning assistance, data and inventories in accordance with the Prospectus. The Department, to the fullest extent possible, and as permitted by existing State and Federal regulations, will provide assistance in the protection of necessary rights-of-way for those transportation corridors designated on the Transportation Plan.

Research Triangle Regional Public Transportation Authority

Triangle Transit will assist in the transportation planning process by providing planning assistance, data, and inventories in accordance with the Prospectus. Triangle Transit shall comply with adopted reporting and oversight procedures for the receipt of federal transportation funding designated for the region's Urbanized Areas as approved by the Executive Board through the Unified Planning Work Program

Section III. Termination

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024

Parties to this Memorandum of Understanding may terminate their participation in the N. C. Capital Area Metropolitan Planning Organization by giving thirty (30) days written notice to the other parties prior to the date of termination. If any party should terminate participation, this memorandum of understanding shall remain in force and the MPO shall continue to operate as long as 75% or more of the population within the Metropolitan Planning Area is represented by the remaining members.

Section IV. Ratification

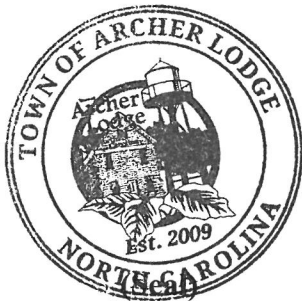
In witness whereof, the parties of this Memorandum of Understanding have been authorized by appropriate and proper resolutions to sign the same, The Town of Angier by its Mayor, the Town of Apex by its Mayor, the Town of Archer Lodge by its Mayor, the Town of Bunn by its Mayor, the Town of Cary by its Mayor, the Town of Clayton by its Mayor, the Town of Coats by its Mayor, the City of Creedmoor by its Mayor, the Town of Franklinton by its Mayor, the Town of Fuquay-Varina by its Mayor, the Town of Garner by its Mayor, the Town of Holly Springs by its Mayor, the Town of Knightdale by its Mayor, the Town of Lillington by its Mayor, the Town of Morrisville by its Mayor, the City of Raleigh by its Mayor, the Town of Rolesville by its Mayor, the Town of Wake Forest by its Mayor, the Town of Wendell by its Mayor, the Town of Youngsville by its Mayor, the Town of Zebulon by its Mayor, the Triangle Transit Authority by its Chair, Chatham County by its Chairman of the Board of Commissioners, Franklin County by its Chairman of the Board of Commissioners, Granville County by its Chairman of the Board of Commissioners, Harnett County by its Chairman of the Board of Commissioners, Johnston County by its Chairman of the Board of Commissioners, Wake County by its Chairman of the Board of Commissioners, and by the Secretary of Transportation on behalf of the Governor of the State of North Carolina and the North Carolina Department of Transportation, this the _____ day of _____, 2024.

[SIGNATURE PAGES TO FOLLOW]

N. C. Capital Area Metropolitan Planning Organization

Memorandum of Understanding (cont.)

April 17, 2024



TOWN OF ARCHER LODGE

Jim H. Max
Clerk

By *[Signature]*
Mayor



**Special Meeting - Minutes
Monday, June 24, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry

Council Member Bruton

Council Member Jackson
Council Member Purvis

Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Town Administrator/Finance Director
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk
Joyce Lawhorn, Deputy Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No changes or additions.

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved the Agenda

CARRIED UNANIMOUSLY

3. DISCUSSION AND POSSIBLE ACTION ITEMS:

6

a) Discussion and Possible Action of Adopting the Budget Amendment for Fiscal Year Ending June 30, 2024 ~ BA 2024 03

Ms. Batten explained the justification for the budget amendment. She shared that this budget amendment is something that the Town does every year. No further discussion.

Mayor Mulhollem called for a motion.

The signed Budget Amendment (BA 2024 03) is attached below.
Moved by Council Member Wilson Seconded by Mayor Pro Tem Castleberry
Adopted Budget Amendment for Fiscal Year Ending June 30, 2024 ~ (BA 2024 03)

CARRIED UNANIMOUSLY

[BA 2024 03 Signed](#)

b) PUBLIC HEARING - Proposed Annual Budget Ordinance for Fiscal Year 2024-2025

- 1. Open Public Hearing**
- 2. Public Comments (Maximum of 30 minutes allowed; 3 minutes per person)**
- 3. Close Public Hearing**

1. Mayor Mulhollem called for a motion to **Open the Public Hearing**.
2. Mayor Mulhollem asked if there were any **Public Comments**.
 - Mr. Ed and Judy Perry of 403 Deer Woods Ct., Archer Lodge chose not to speak.
 - Mr. Billy Brown of 389 Loop Road, Archer Lodge chose not to speak.
 - Mr. Chris Davis of 12453 Buffalo Road, Archer Lodge, informed that he attended the meeting to ask the Board to vote against increasing taxes for the Town and would like for the Town to look into getting an ETJ.
 - Ms. Terri Richards of 120 Bentley Way, Archer Lodge, asked what the tax increase money will be spent on.
 - Mr. Kent Price of 14700 Buffalo Road, Archer Lodge, asked that there not be a price increase unless it was justifiable.
 - Mr. Robert Thompson of 286 Autumn Ridge Drive, Wendell, questioned how much revenues were received this year and was against a tax increase.
 - Mr. Chuck Caulder of 264 Kentucky Drive, Archer Lodge, asked Council to remember why the Town was formed and informed that he was against a tax increase.
 - Mr. Brett Bruton of 14765-4 Buffalo Road, Archer Lodge, asked Council and Staff to re-evaluate the budget and not increase taxes.
 - Mr. Dean Parkerson of 611 Deep Forest Lane, Archer Lodge, asked if there was a cap that the Town can charge. Recommended having businesses come to the Town for revenue to offset the cost of taxes.
 - Mr. Richie Hogg of 212 Cecil Road, Wendell, reiterated what the speakers before him had discussed. He asked that the Town communicate to the citizens better when a meeting is being held. He asked that Council reconsider increasing taxes.
 - Mr. Philip Parker of 14960 Buffalo Road, Archer Lodge, expressed concerns with the Town not keeping its small town character. He volunteered to help the Town with tasks to help keep taxes from being increased. Appreciated the transparency and communication of the Town. He was against the tax increase.
 - Mr. Josh Barbour of 420 Tafton Drive, Wendell, discussed his thoughts on the effect of re-evaluation of property by the County. He expressed his appreciation for Council and shared that he would be happy to volunteer to help the Town. He asked the Board to vote no for the tax increase.
 - Ms. Martha O'Neal of 7968 Covered Bridge Road, Wendell shared that everyone had expressed her feelings regarding the tax increase. She reflected on the incorporation of the Town and discussed her desire to not see anyone lose their home and the tax increase causing burdens on the citizens. She thanked the Council for their work.
 - Ms. Robin Metz of 303 Nashville Drive, Archer Lodge reflected on her move to the Town and shared that she agreed with other public comments and asked Council to not to raise taxes on people that are retired.
 - Ms. Franky Edwards reflected on the years she had been in the Town and reiterated the former comments. She questioned the

infrastructure and roads needing to be addressed. She asked that Council not do anything that would hurt or harm struggling families or farms. She thanked Council for the opportunity to speak.

- Mr. Tony Roco of 57 Nashville Drive, Archer Lodge reflected on the time he had lived in the Town and expressed his thoughts on the notifications of the public hearings.
- Ms. Sonia Wolk of 457 Barrett Land, Wendell, compared the meeting to a former meeting in Mount Olive, NC.
- Sent by email, Ms. Beth Barnes Ziglar suggested that meetings be held virtually and expressed the need to have it available to citizens.

Mayor Mulhollem called for a motion to closed the Public Hearing.

Mayor Mulhollem opened the floor for discussion.

Points of Discussion:

- Recommendation for Parks & Recreation to slow down and reduce the amount of sports played due to cost.
- Concerns regarding services offered by the Town and what services are provided by Johnston County.
- Recommended a change in the budget process and have a grasp on what the proposal is much earlier in the year.
- Incorporation of the Town has allowed Archer Lodge to control its destiny with zoning and land planning.
- Population in Archer Lodge has increased from 250 to over 5,000.
- After incorporation, citizen workshops and surveys were provided to get feedback and Parks & Recreation was on the top of the list.
- During the early years of the Town there was a tax increase of \$.05, with \$.02 going for the immediate needs of the Town, and \$.03 being set aside for the purchase park land, that was purchased in 2018 with grants and state and federal funds that were awarded afterwards to help with the costs.
- The Town Park has required hiring more staff for its operation and maintenance.
- The Town's growth is due to some farm land being sold to developers.
- Recommendation to not give COLA (Cost of Living Adjustment) increases to Staff and everything be merit accountability, based on performance.
- Funds are being set aside, in a Reserve Fund, for Public Safety
- Parks & Recreation charge a citizen rate for sports and a non-citizen rate that is comparable to surrounding towns and is offering outstanding sports activities.
- Due to the possibility of unexpected expenses for public safety the Town must be prepared for the costs with the Public Safety Fund.
- The costs for the Town Park was more than double in pricing due the COVID Pandemic.
- Recommendation to not go into the Fund Balance to pay Town expenses.
- Noted that a lot of effort is put into utilizing available sources.
- The Town has agreements with the Archer Lodge Community Center and Johnston County Public Schools for use of the fields and gym at Archer Lodge Middle and Riverwood School that help in spreading the funds.
- The west side of the Park will be the operational location for the Parks & Recreation Department.

Mayor Mulhollem informed that he would be available after the meeting if any of the public has questions. He thanked everyone for their attendance.

Moved by Council Member Jackson Seconded by Council Member Purvis

Approved to Open the Public Hearing at 6:35 p.m.

CARRIED UNIMOUSLY

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved to Close the Public Hearing at 7:07 p.m.

CARRIED UNANIMOUSLY

c) Discussion and Possible Action of Adopting the Annual Budget Ordinance for Fiscal Year 2024-2025

Mr. Chadwick provided an explanation of the process that transpired during budget planning and the background. He shared that it is not sustainable to continually take from the Fund Balance, which is savings. Mr. Chadwick informed that after discussions with Staff and Council he had made reductions to the proposed budget. He shared the list of items, with a grand total of \$155,450.00 reduced. Discussion followed.

In additions to the proposed changes, and mirroring Johnston County, Mr. Chadwick recommended reducing employees COLA from 4% to 3%, keeping merit at up to 2% in January. He also recommended removing all of COLA and Merit for the Town Administrator position. Mr. Chadwick recommended reducing the recommended tax increase from \$0.10 to \$0.07 per \$100.00, and noted that \$0.02 of this increase is required to mirror the \$0.14 Fire District Tax rate set by Johnston County, to go to North Side Fire Department.

Mayor Mulhollem opened the floor for discussion:

- Council Member Bruton shared some items she would like to reduce in the budget. Discussion followed.
- Attorney Burrell shared that the revenues from Johnston County revaluation of property would not be realized until the Fiscal 2025 - 2026 Budget year.
- Council Member Purvis reminded Council to keep the discussions strictly on the budget.

Mayor Mulhollem restated Mr. Chadwick's modified proposal to the budget:

- \$0.07 Increase total with \$0.05 for Town needs and \$0.02 going to the North Side Fire Department.

Mayor Mulhollem called for a motion for either of the following:

- Adopt the modified budget proposal of \$0.05 tax increase for Town needs and \$0.02 tax increase going directly to the North Side Fire Department, a total of \$0.07 tax increase.
- No tax increase for the Town and operating a greater percentage out of Fund Balance.

Council Member Wilson called for a motion to adopt the modified budget proposal of \$0.05 for Town needs and \$0.02 going directly to the North Side Fire Department, a total of \$0.07 tax increase.

After Council Member Wilson's motion failed, Council Member Jackson called for a motion to leave the tax rate as is, with the exception of the \$0.02 tax increase for the North Side Fire Department District.

Moved by Council Member Wilson Seconded by Council Member Purvis

Motion failed to adopt the modified Annual Budget Ordinance proposal for Fiscal Year 2025-2026 with an increase in the town's tax rate of five-cents (\$0.05) and an increase in the North Side Fire Department of two cents (\$0.02), a total of seven cents (\$0.07) tax increase

FAILED 2 IN FAVOR (WILSON & PURVIS), 3 OPPOSED (CASTLEBERRY, BRUTON, & JACKSON))

Moved by Council Member Jackson Seconded by Council Member Bruton

Adopted the Annual Budget for Fiscal Year 2025-2026 with no increase in the town's tax rate and a \$0.02 tax increase for the North Side Fire Department

CARRIED 3 IN FAVOR (CASTLEBERRY, BRUTON, & JACKSON) - 2 OPPOSED (WILSON & PURVIS)

4. ADJOURNMENT:

a) Having no further business, Mayor Mulhollem called for a motion to adjourn the meeting.

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved to adjourn the meeting at 8:43 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk

Town of Archer Lodge
Fiscal Year Ending June 30, 2024



Budget Amendment # BA 2024 03
Date: 24-Jun-24

General Fund

Regional Economic Development Reserve Directed Grant '24 (24REDR)

Account	Account Number	Budget	Amendment	Amended Budget
Revenues:				
Gen/Article 39 1% Sales Tax	10-3239-0000	132,000.00	30,000.00	162,000.00
Gen/Article 40 1/2% Sales Tax	10-3240-0000	91,000.00	20,000.00	111,000.00
Gen/Article 42 1/2% Sales Tax	10-3242-0000	68,000.00	20,000.00	88,000.00
Gen/Article 44 NCGS 105-524 Sales Tax	10-3244-0524	15,000.00	6,000.00	21,000.00
Gen/Alcohol Beverage Tax	10-3322-0000	21,500.00	3,500.00	25,000.00
Gen/Parks & Recreation Rentals	10-3351-0000	10,000.00	2,000.00	12,000.00
Gen/Contributions	10-3833-0000	-	500.00	500.00
24REDR/Regional Economic Development Reserve Grant '24	44-3484-0000	-	2,365,000.00	2,365,000.00
24REDR/Transfer from General Fund 10	44-3900-3910	2,365,000.00	(2,365,000.00)	-
Total Increase (Decrease) in Revenues			82,000.00	

Expenditures:				
Gen/Admin/Professional Fees	10-4120-1900	16,000.00	2,000.00	18,000.00
Gen/Admin/Dues & Subscriptions	10-4120-4000	4,000.00	500.00	4,500.00
Gen/Tax Collections Fees (NC & JoCo)	10-4140-4950	35,000.00	1,000.00	36,000.00
Gen/Public Buildings/Communications	10-4190-3340	11,000.00	9,000.00	20,000.00
Gen/Public Buildings/Veterans Memorial	10-4190-5200	4,000.00	1,000.00	5,000.00
Gen/Public Buildings/Building Permits	10-4190-5900	9,000.00	12,300.00	21,300.00
Gen/Public Safety/Contracted Services/Fire Department	10-4300-3500	485,000.00	20,000.00	505,000.00
Gen/Planning_Zoning/Supplies	10-4910-2000	2,000.00	500.00	2,500.00
Gen/Parks & Recreation/Supplies	10-6120-2000	5,000.00	1,000.00	6,000.00
Gen/Parks & Recreation/Program Materials & Supplies-Parks & Rec	10-6120-2050	66,000.00	12,000.00	78,000.00
Gen/Parks & Recreation/Uniforms	10-6120-2080	300.00	700.00	1,000.00
Gen/Parks & Recreation/Contracted Services	10-6120-3500	364,804.13	22,000.00	386,804.13
Total Increase (Decrease) in Expenditures			82,000.00	

Justification for Budget Amendment:

To appropriate or reappropriate unanticipated revenues and expenditures as recorded.

Adopted this 24th day of June 2024

ATTEST:

Jenny Martin, Town Clerk



Matthew B. Mulhollem, Mayor

Bryan Chadwick, Budget Officer



**Special Meeting - Minutes
Monday, August 19, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Purvis
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Town Administrator/Finance Director
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

ATTENDING VIRTUALLY:

Mindy Arthur, ASLA, PLA, LEED AP, Susan Hatchell, PLLC
Mike Allen, Land Development Mgr., NV5

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:31 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) Mayor Mulhollem shared that for efficiencies sake, it was requested that he move Discussion Items 4. a), b), and c) to up under Discussion and Possible Action Items 3. a) due to the Susan Hatchell Landscape Architecture, PLLC group presenting their presentation on-line.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Approved to Amend Agenda Items 3. a) Discussion and Possible Actions Items and Agenda Item 4. a), b), and c) Discussion Items as requested

CARRIED UNANIMOUSLY

3. DISCUSSION AND POSSIBLE ACTION ITEMS:

a) Discussion and Possible Action of Approving the Contract with Susan Hatchell Landscape Architecture, PLLC to Update the Archer Lodge Comprehensive Parks and Recreation Master Plan

Mr. Chadwick provided a brief overview of the proposed contract to update the Archer Lodge Comprehensive Parks and Recreation Plan. He recommended the approval of the contract due to the possibility of approval

of an Accessibility Grant.

Points of Discussion:

- Susan Hatchell Landscape Architecture, PLLC being contracted for the original Archer Lodge Master Parks and Recreation Plan.
- Ms. Mindy Arthur, ASLA, PLA, LEED, AP Senior Project Mgr., clarified the services and costs for Council Member Bruton.

Mayor Mulhollem called for a motion.

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Approved the Contract with Susan Hatchell Landscape Architecture, PLLC to Update the Archer Lodge Comprehensive Parks and Recreation Master Plan, as presented

CARRIED UNANIMOUSLY

b) Discussion of Corner Lot Update

Mr. Chadwick introduced Mr. Mike Allen, NV5, Technical Engineering & Consulting Solutions, and provided Council draft drawings of the proposed parking lot to be located at the corner of Archer Lodge Road and Buffalo Road. Mr. Allen and Ms. Arthur provided an explanation of the specifics required for adding a parking lot on the corner. Discussion followed.

Points of Discussion:

- Removal of some of the trees to allow more parking spaces.
- The proposed parking lot not being affected by tanks that had been placed in the ground several years ago.

c) Discussion of Park Westside Parcel Update

Ms. Arthur and Mr. Allen provided updates on the preparation for a building to be placed on the Westside Parcel of the Town Park. Discussion followed.

d) Discussion of Multipurpose Field Lights

Mr. Chadwick provided Council the second drawing of the multipurpose fields and reviewed it with them to give clarity of the placement and lighting of the fields. Discussion included the availability of funds and types of sports that can be played on the fields.

e) Discussion and Possible Action of Approving the Memorandum of Agreement for Personnel Services between the Town of Archer Lodge, the North Carolina League of Municipalities (NCLM) and the MAPS Group

Mr. Chadwick explained the MAPS Group Contract and noted that the last study had been adopted in 2018. Discussion followed. Council Member Bruton recommended tabling the study due not being in the FY25 Budget.

The consensus of Council was to table until a future meeting date.

4. DISCUSSION ITEMS:

a) Discussion of Planning/Zoning Updates

Mr. Kress continued his discussion from the Monday, August 5, 2024, Town

Council Meeting, regarding amending the ordinance to allow expansion of the AR (Agriculture & Rural) Districts for accessory structures to 50% of the principal structure. Mr. Kress informed that he had emailed the requested UDO information that explains the Town's standards for accessory use. Council Member Bruton informed that she preferred to leave the ordinance as is and Council Member Jackson and Mayor Pro Tem Castleberry agreed. Attorney Burrell shared an explanation of the law regarding the ordinance, in efforts to help explain the situation at hand. Discussion followed.

b) Discussion of Part-Time Executive Assistant Job Description

Ms. Martin informed Council that the proposed position will be part-time and is not eligible for benefits. She provided an overview of the job tasks. Mayor Mulhollem asked if the position was included in the FY2025 Budget, Ms. Martin confirmed that it was. No further discussion.

c) Discussion of Filling Vacant Council Member Position

Attorney Burrell explained the process and procedure for the vacant seat on the Council, due to the resignation of former Council Member Purvis. Discussion followed. Mayor Mulhollem recommended that the position be filled by October 2024, and the Council were in agreement. Mayor Mulhollem asked Staff to include filling the vacant seat on the October 7, 2024, Town Council Meeting Agenda.

**5. CLOSED SESSION:
§ 143-318.11(a)(6)**

a) Attorney Burrell advised Council to enter into Closed Session as permitted by § 143-318.11(a)(6).

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Approved to Enter into Closed Session as permitted by § 143-318.11(a)(6) at 7:55 p.m.

CARRIED UNANIMOUSLY

6. RETURN TO OPEN SESSION:

a) Mayor Mulhollem call for a motion to return to open session.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Approved to return to Open Session at 9:53 p.m.

CARRIED UNANIMOUSLY

7. ADJOURNMENT:

a) Having no further discussion, Mayor Mulhollem call for a motion to adjourn.

Moved by Council Member Wilson
Seconded by Council Member Jackson

Approved to Adjourn Meeting at 9:53 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Regular Council - Minutes
Monday, September 9, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Chris Allen, Parks & Recreation Director
Marcus Cameron, Parks Maintenance Specialist
Blake McLean, Parks Maintenance Specialist
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

Council Member Wilson

MEDIA PRESENT:

None

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) Mayor Mulhollem shared that due to the recipients not being able to be in attendance, it has been requested that we remove Agenda Item 6, Presentations.

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Approved Agenda to Remove Item 6, Presentations as Requested

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

a) Mr. Mike Simonetti of Archer Lodge, NC spoke on behalf of him and his neighborhood at Heritage Subdivision regarding the fire alarm repeatedly going off at the North Side Fire Department and being annoying. Mr. Chadwick explained that the Fire Department had reduced the amount of times the alarm goes off.

4. CONSENT AGENDA:

- a) **05 Jun 2023 Regular Meeting**
26 Jun 2023 Special Meeting & Public Hearing
10 Jul 2023 Regular Meeting
22 Jan 2024 Special Meeting
05 Aug 2024 Regular Meeting
-

b) Part-Time Executive Assistant Job Description

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry
Approved the Consent Agenda

CARRIED 2 TO 1 (Bruton opposed)

5. ORGANIZATIONAL ITEMS:

a) **Welcome Marcus Cameron and Blake McLean, Archer Lodge's Parks Maintenance Specialists**

Mr. Allen welcomed Mr. Cameron and Mr. McLean to the Town and shared an overview of their background.

6. TOWN ATTORNEY'S REPORT:

a) **Attorney Burrell had no report.**

7. TOWN ADMINISTRATOR'S REPORT:

a) **Mr. Chadwick reported the following:**

- Reminded everyone of the Monday, September 23, 2024 Work Session.
 - There is a possibility of cost sharing with the Fire District.
 - He informed that the highest bid on the farmhouse, located on the west side of the Town Park, is at \$78.00 and 29 people are following the auction bids.
-
-

8. ASSISTANT TOWN ADMINISTRATOR/FINANCE OFFICER'S REPORT:

a) **Interim Financial Reports for July 2024**

Ms. Batten shared an interim summary for all funds ending July 31, 2024. For the month, we were in the red by around \$82,000.

Regarding the Capital Reserve Fund 30, Ms. Batten mentioned that they only transaction for the month is the investment earnings.

Regarding the Park Reserve Fund 31, Ms. Batten mentioned that the only activity has been the investment earnings.

Regarding the Public safety Reserve Fund 32, Ms. Batten mentioned that the only activity has been the investment earnings.

When comparing revenues in July 2023 with July 2024 in the General Fund, Ms. Batten mentioned that we are at around \$27 more this year. Ms. Batten stated that the expenditures for this year was around \$34,000 more this year.

9. PARK AND RECREATION DIRECTOR'S REPORT:

a) Mr. Allen provided an update on Fall Season Sports as follows:

- There are 2 flag football teams starting next Saturday.
 - Baseball games are starting up with games every night until Wednesday, October 30, 2024.
 - With the USA Archery Grant, the Town will be providing Archery Classes in the Fall and will be instructed by Mr. Allen, Certified Archery Instructor.
-

10. PLANNING/ZONING REPORT:

a) Animal Control Report August 2024:

- 12 Activities for complaints and telephone follow-ups.
 - 10 Code Enforcement Actions for cats and dogs with verbal/written warnings.
-

b) Planning/Zoning Report

- Zoning has been slower during August.
 - Will have more Code Enforcement activity in September 2024.
-

11. MAYOR'S REPORT:

a) Mayor Mulhollem had no report.

12. COUNCIL MEMBERS' REMARKS:

a) Council Member Jackson had no remarks.

b) Mayor Pro Tem Castleberry had no remarks.

c) Council Member Bruton had no remarks.

13. ADJOURNMENT:

a) Having no further business, Mayor Mulhollem call for a motion to adjourn.

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Approved to Adjourn Meeting at 6:50 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Work Session - Minutes
Monday, September 23, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry

Council Member Bruton

Council Member Jackson
Council Member Purvis

Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Assist. Town Admin./Finance Officer
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

1 WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:31 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2024-2025 Little Miss Archer Lodge, Addie Grace Little, shared that she is a 4th grader and attends River Dell Elementary School. She shared her goals for using the money she has raised during the Summer and her plans for volunteering in the community as follows:

- Sponsor a student's summer camp through Clayton Theatricals, where she performed in The Little Mermaid.
- 2024-2025 Little Miss Archer Lodge & 1st Place Runner Up, Viverette Thompson, plan to sponsor families from the Angel Tree at their schools to provide Christmas gifts.
- Stocking "Blessings Boxes" found around Town.
- In the coming months, plans are to restock school supplies and organize a food drive.
- Keep the community beautiful by picking up trash.

Miss. Little encouraged all her friends and neighbors to vote and thanked the Town for the opportunity to serve.

Mayor Mulhollem thanked Miss. Little for attending and commended her goals to beautify the community and for helping others.

2 ASSISTANT TOWN ADMINISTRATOR/FINANCE OFFICER'S REPORT:

a) Interim Financial Reports for August 2024

Ms. Batten shared an interim summary for all funds ending August 31, 2024. She shared that we are around 5% collected for the fiscal year. Ms. Batten explained that to date we were around \$219,000 or 14% for expenditures for the fiscal year.

Regarding the Capital Reserve Fund, Ms. Batten mentioned that the only transactions have been related to investment earnings, totaling \$238.

Regarding the Park Reserve Fund, Ms. Batten mentioned that the only transactions have been related to investment earnings, totaling \$541. She explained that a small transfer from the \$0.02 cents that are earmarked for property taxes occurred, totaling \$46.54. She elaborated that the only activity for the month was a transfer from the Park Reserve Fund into the General Fund of \$56,000 for debt payment to the Smith Family.

Regarding the Public Safety Reserve Fund, Ms. Batten mentioned that the only activity in that fund is the investment earnings, totaling \$1,900. She shared that the Year to date for the Public Safety Reserve Fund is at \$3,700.

When comparing revenues in August 2023 with August 2024 in the General Fund, Ms. Batten mentioned that we were around \$5,300 more this year. When comparing expenditures between the two years, Ms. Batten shared that we were about \$59,167 more in expenditures this year. Ms. Batten explained that the net difference is about \$54,000.

3 DISCUSSION OF THE PROCESS TO FILL THE VACANT COUNCIL MEMBER POSITION:

a) Application

Mr. Chadwick shared that he and Mayor Mulhollem had discussed a revision of the original Planning Board/Board of Adjustment Application Form to combine the Governing Body/Town Council on the same application. He informed that 3 citizens have shown interest to-date in serving in the vacant position on the Town Council Board. If approved, Mr. Chadwick suggested Monday, September 30, 2024, as a deadline to apply and be included on Town Council Agenda at the October 7, 2024, Regular Council Meeting. Discussion followed.

It was the consensus of the majority of Council to approve the revised application and a deadline of September 30, 2024, to submit an application for the vacant Town Council seat.

4 INTERNAL EMPLOYEE BENEFITS & SALARY STUDY INFORMATION:

- a) Ms. Martin shared that based on the initial conversations on benefits and salaries of local entities, she put together a comparison of local entities in the area. She asked Council and Staff to brainstorm the reasons that enticed them to their current or former jobs. Discussion followed with Council and Staff sharing their results. She presented a presentation on her comparison of local salaries and benefits from the research she had gathered. Discussion followed. As a result of the comparisons study, Ms. Martin shared her recommendations on benefits and salaries for employees of the Town. Ms. Martin informed Council that she would provide a link for the presentation to allow them to review all of the information. Mayor Mulhollem thanked Ms. Martin for her informative presentation.**

5 COUNCIL MEMBERS' GOALS:

- a) **Mayor Mulhollem recommended that Council review the results of the Benefits & Salary Study provided by Ms. Martin, contact Staff with any questions, and be prepared to discuss at a future meeting.**
-

6 ADJOURNMENT:

- a) **Having no further business, Mayor Mulhollem adjourned the meeting at 8:12 p.m.**
-

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Regular Council - Minutes
Monday, October 7, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Jackson
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Jenny Martin, Human Resources Officer/Town Clerk
Joyce Lawhorn, Deputy Town Clerk

COUNCIL ABSENT:

Council Member Bruton

GUESTS PRESENT:

Ms. Diane Brantley and Family Members

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

- a) Mayor Mulhollem announced he had just been made aware that Council Member Bruton would not be able to attend. He recommended that Agenda Item 6.a) Discussion and Possible Action of Appointing or Reappointing Vacant Council Member Position be moved to the Monday, November 4, 2024, Regular Council Meeting due to the absence of Ms. Bruton.**

Moved by Council Member Wilson
Seconded by Mayor Pro Tem Castleberry

Approved to remove Agenda Item 6.a) Discussion and Possible Action of Appointing or Reappointing Vacant Council Member Position and add to the Monday, November 4, 2024 Town Council Meeting Agenda

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

- a) Chris Davis of 12453 Buffalo Road, Archer Lodge asked Council to have Staff take care of overgrown grass at the park playground. He**

also asked Council to adopt an ETJ (Extra-Territorial Jurisdiction) in the Town. Mayor Mulhollem noted that the playground area would be taken care of.

4. CONSENT AGENDA:

- a) **Approval of Minutes:
18 Apr 2022 Special Meeting - Public Hearing
05 Aug 2024 Regular Meeting - Public Hearing**
-

b) **Acceptance of Resignation for Council Member James "Jim" Purvis III**

Moved by Council Member Wilson
Seconded by Mayor Pro Tem Castleberry

Approved the Consent Agenda

CARRIED UNANIMOUSLY

5. RECOGNITION/PRESENTATION:

a) **Recognition - Long Time Citizen and Archer Lodge Supporter, Mr. Neal Brantley, Sr.**

In recognition of Mr. Neal Brantley, Mayor Mulhollem welcomed Ms. Diane Brantley and family to the meeting. He reflected on the fond memories he had with Mr. Brantley and his family. Mayor Mulhollem shared that Mr. Brantley would speak during the Public Comments at the Town Council meetings and noted that his comments were very uplifting and always had a purpose. He commended Mr. Brantley for being an active volunteer at the Archer Lodge Community Center and mentioned that he was known as the "Candy Man" due to always sharing candy with everyone. Mayor Mulhollem added that Mr. Brantley would be surely missed by everyone.

Mayor Mulhollem opened the floor for Council Members and Staff to share their remarks:

- Council Member Wilson shared that he got to know Mr. Brantley more during the time he spent with him on his early morning trips to the gym. He noted that Mr. Brantley was a very nice man and that when he spoke at the Council Meetings, you could always learn something from his visits. Mr. Wilson shared that he appreciated him and his support for the Veterans Memorial Committee. He added that Mr. Brantley would be missed in the community.
- Council Member Jackson shared that he always looked forward to Mr. Brantley coming to the meetings, sharing his speeches and candy. He shared that he appreciated him and that he would be missed by everyone.
- Mayor Pro Tem Castleberry shared that he was legendary and that he helped him learn a lot of history. He reflected on time spent with him and Ms. Brantley and how much he enjoyed it. He asked Mr. Brantley's family to follow his legacy of life and they would not go anywhere but up. He expressed how much he loved him.
- Ms. Batten shared that Council may not be aware, but Staff got candy from Mr. Brantley too. She said that when he visited Town Hall and one of the staff members was not at work, he would leave candy on their desks. Ms. Batten informed that he loved Staff and Staff loved him as well and would share laughs with him. Ms. Batten reflected on when she would say "It was so good to see you", he would come back and say "It's good to be seen". She added that he would be missed. Ms. Batten expressed appreciation for Mr. Brantley always informing Staff of Town Limit signs that needed repair.
- Mr. Chadwick shared that the world could learn a lot from Mr. Brantley because was always positive and uplifting.

- Ms. Martin said that one of her fond memories was when Mr. Brantley gave her a mini Hershey's chocolate bar that had "Special" wrote on it and then he pointed at the word "Special" and said that is what you are. She shared that he would definitely be missed by everyone.

Mayor Mulhollem presented Ms. Brantley with a gift of wind chimes in appreciation of Mr. Brantley, that read as follows:

- Forever in our hearts, in loving memory of Neal Brantley, Sr., June 22, 1940 - August 21, 2024.

Ms. Brantley shared that the chimes were very substantial and would be placed on her porch. She thanked everyone for all of the kind words. (Everyone applauded.)

7 b) Proclamation - Breast Cancer Awareness Month

Mayor Mulhollem proclaimed October 2024 as Breast Cancer Awareness Proclamation Month by reading the Proclamation.

The signed proclamation is attached below.

[Proclamation - Breast Cancer Awareness Month October 2024 Signed](#)

6. DISCUSSION AND POSSIBLE ACTION ITEMS:

a) Discussion and Possible Action of Appointing or Reappointing Vacant Council Member Position

Removed from Agenda

8 - 9 b) Discussion and Possible Action of Adopting a Resolution Supporting Congressional Funding for the Disaster Relief Fund, Continuance of Halted Recovery Projects, and Sufficient Provisions to Prevent Future Immediate Needs Funding (Resolution# AL2024-10-7a)

Mr. Chadwick provided an explanation of the adoption of Supporting Congressional Funding for the Disaster Relief Fund, Continuance of Halted Recovery Projects, and Sufficient Provisions to Prevent Future Immediate Needs Funding.

Mayor Mulhollem opened the floor for discussion or concerns. Having none, Mayor Mulhollem called for a motion.

The signed Resolution# AL2024-10-7a is attached below.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Adopted Resolution# AL2024-10-7a - Supporting Congressional Funding for the Disaster Relief Fund, Continuance of Halted Recovery Projects, and Sufficient Provisions to Prevent Future Immediate Needs Funding

CARRIED UNANIMOUSLY

[AL2024-10-07a Resolution Signed](#)

10 - 11 c) Discussion and Possible Action of Adopting a Resolution Supporting Operation Green Light for Veterans (Resolution# AL2024-10-7b)

Mayor Mulhollem declared October through November 11, 2024 as a time to salute and honor the service and sacrifice of our men and women in uniform transitioning from active service by observing Operation Green Light and read the resolution supporting Green Light for Veterans.

The signed Resolution# AL2024-10-7b is attached below.

Moved by Mayor Pro Tem Castleberry
Seconded by Council Member Wilson

Adopted Resolution# AL2024-10-7b Supporting Operation Green Light for Veterans

CARRIED UNANIMOUSLY

[AL2024-10-07b Resolution Supporting Operation Green Light for Veterans Signed](#)

12

d) Discussion and Possible Action of Adopting the Budget Amendment for Fiscal Year Ending June 30, 2025 ~ (BA 2025 02)

Ms. Batten shared an explanation for adopting the Budget Amendment regarding rolling over open purchase amounts from FY2023/2024 into FY2024/2025 Budget and how they will be paid out.

The signed Budget Amendment BA 2025 02 is attached below.

Moved by Council Member Wilson
Seconded by Council Member Jackson

Adopted Budget Amendment# BA 2025 02 for Fiscal Year Ending June 30, 2025

CARRIED UNANIMOUSLY

[BA 2025 02 Signed](#)

7. TOWN ATTORNEY'S REPORT:

- a) **On behalf of Mr. Jim Purvis, Attorney Burrell reminded everyone that it is an election year and encouraged everyone to vote. He noted that early voting begins Thursday, October 17, 2024, at the Archer Lodge Community Center. Mayor Mulhollem reminded everyone that Mr. Neal Brantley would have reminded everyone to vote, as well.**

8. TOWN ADMINISTRATOR'S REPORT:

- a) **Mr. Chadwick shared that Mr. Chris Allen was attending a conference and that he provided Mr. Chadwick with an update on Parks & Recreation as follows:**
- **Basketball registration is currently open and will run through Friday, November 1, 2024.**
 - **Baseball season had been extended due to inclement weather.**
 - **An introductory Archery Class has been scheduled for Saturday, November 2, 2024.**
 - **Staff received the Parks & Recreation Master Plan Update and Accessible Parks Grant Application Schedule, that was included in the Agenda Packet, explaining the schedule and what will be expedited. He advised that the schedule will be posted. He noted that there will be introductory discussions, public forums, and surveys regarding the update of the Parks and Recreation Master Plan.**

Mr. Chadwick shared information regarding a 1,000 acres of land located in the middle of the Town of Summerfield, NC being de-annexed. He added that Mayor Pro Tem Lynne Devaney, who was unable to attend in person, wanted to thank Council for being willing to show their support during the legislative session to stop the de-annexation, even though it didn't work out for their town.

Mr. Chadwick expressed appreciation to all the Emergency Responders for their help for victims of Hurricane Helene. Discussion followed. He shared sources available for anyone that would like make donations.

9. HUMAN RESOURCES OFFICER/TOWN CLERK'S REPORT:

- a) **Ms. Martin shared information regarding open enrollment for medical insurance and the status of the new Parks & Recreation and Executive Assistant positions. She shared that she had been assisting a member of Staff that will be retiring soon.**
-

10. PLANNING/ZONING REPORT:

a) Zoning Permit Report

Mr. Kress shared the following:

- He shared that although he had not had the fortune to get to know Mr. Brantley, it's clear the impact that he had on the community was very large and meaningful and he hopes that, moving forward, Staff and Council will take the lessons that he has bestowed upon them, through him, in their the day-to-day functions.
 - Update on Planning and Zoning Permits - July - August 2024:
 - Received 20 Zoning Permit Applications
 - 13 Permit were issued. (see attached report for more details)
 - Participating in a School of Government Certified Zoning Official Course - Planning and Development Regulations and added that he has been attending workshops and summits to gather updates in North Carolina and share with Staff and Council.
 - Update on Code Enforcement:
 - Mr. Kress will be managing Code Enforcement.
 - He has reviewed code enforcement cases that were opened by Alliance Code Enforcement and as of October 1, 2024, 16 of the 24 cases have been closed.
 - Aside from the Alliance Code Enforcement cases, Mr. Kress has opened 2 other cases.
 - See attached report for more details.
 - He reminded Council of the Land Use Plan that will be held at Town Hall on October 9, 2024. Mr. Kress and Mr. Chadwick expressed the importance of attending.
-

b) Code Enforcement Report

Mr. Kress shared the following update on Code Enforcement:

- Mr. Kress will be managing Code Enforcement.
 - He has reviewed code enforcement cases that were opened by Alliance Code Enforcement and as of October 1, 2024, 16 of the 24 cases have been closed.
 - Aside from the Alliance Code Enforcement cases, Mr. Kress has opened 2 other cases.
 - He reminded Council of the Land Use Plan Open House that will be held at Town Hall on Wednesday, October 9, 2024. Mr. Kress and Mr. Chadwick expressed the importance of attending.
-

11. MAYOR'S REPORT:

- a) **Mayor Mulhollem asked everyone to continue praying for the Residents and Emergency Personnel, First Responders, and Electric**

Linemen working in the Western part of North Carolina due to Hurricane Helene. He expressed appreciation for the people that are donating items and delivering them.

12. COUNCIL MEMBERS' REMARKS:

a) **Mayor Pro Tem Castleberry reiterated Mayor Mulhollem to pray for the Western part of North Carolina and shared information regarding people delivering donations to them. He thanked Staff for their work for the Town.**

b) **Council Member Jackson shared that Mr. Brantley has a special place in their hearts and added that Mr. Jim Purvis, who they accepted his resignation, is a good man in the community and will be missed on the Town Council. He informed everyone that the local National Guard of Smithfield, NC have been in the Western part of North Carolina helping people, and he asked everyone to remember that it will take a long time for them to recover and to please continue their donations.**

c) **Council Member Wilson shared that everyone's willingness to donate to the Ashville, NC area is admirable and asked them to beware of people who are scammers and are trying to steal donations for themselves.**

Mr. Chadwick reminded everyone that the Town has a link on the Town Website for donations to the North Carolina Disaster Relief Fund.

13. ADJOURNMENT:

a) **Having no further business, Mayor Mulhollem called for a motion to adjourn the meeting.**

Moved by Council Member Wilson
Seconded by Council Member Jackson

Approved to adjourn the meeting at 7:23 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



Proclamation



WHEREAS, while breast cancer touches the lives of Americans from every background in every community, while considerable progress has been made in the fight against breast cancer; and

WHEREAS, it is estimated that more than 310,720 new cases of invasive breast cancer in women will be diagnosed in the United States in 2024 and about 2,790 new cases of invasive breast cancer are expected to be diagnosed in men in 2024; and

WHEREAS, October is Breast Cancer Awareness Month, an annual campaign to increase awareness about the disease; and

WHEREAS, during this month, we as a community support breast cancer research and to educate all citizens about detection, risk factors and treatment; and

WHEREAS, we, as a community, support those courageously fighting breast cancer and honor the lives lost to the disease; and

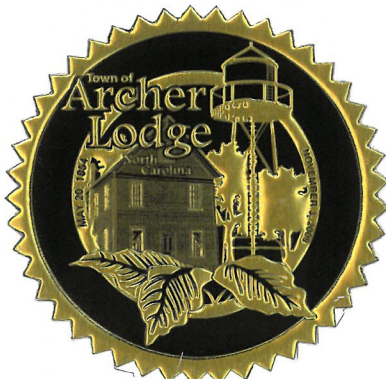
WHEREAS, this October, we recognize breast cancer survivors, those battling the disease, their families who are a source of love and encouragement, and applaud the efforts of our medical professionals and researchers working hard to find a cure; and

NOW, THEREFORE, LET IT BE PROCLAIMED by the Honorable Mayor and Town Council of the Town of Archer Lodge, North Carolina, do hereby proclaim October 2024 as

Breast Cancer Awareness Month

In the Town of Archer Lodge, North Carolina, I encourage citizens to participate in activities that will increase awareness of what Americans can do to prevent breast cancer, and to wear pink ribbons in honor of those who have lost their lives to breast cancer and those who are now bravely fighting this disease.

Duly adopted this the 7th day of October 2024.



Matthew B. Mulhollem
Mayor



TOWN OF ARCHER LODGE
RESOLUTION SUPPORTING CONGRESSIONAL FUNDING FOR THE DISASTER RELIEF FUND, CONTINUANCE OF HALTED RECOVERY PROJECTS, AND SUFFICIENT PROVISIONS TO PREVENT FUTURE IMMEDIATE NEEDS FUNDING

WHEREAS, on August 7, 2024, the Federal Emergency Management Agency (FEMA) announced that the Disaster Relief Fund (DRF) had become depleted, forcing the agency to transition to Immediate Needs Funding (INF) and halting more than \$6.1 billion in recovery activities across the country; and

WHEREAS, the DRF is a critical source of funding for disaster response and recovery efforts, and recent funding gaps have placed undue strain on state and local governments, hindering long-term recovery projects; and

WHEREAS, in 2023, over 840 counties experienced at least one major disaster, with 28 separate billion-dollar disasters totaling over \$92 billion in damages; and

WHEREAS, when FEMA operates under INF, long-term recovery efforts are delayed as disaster funding is severely restricted across the country; and

WHEREAS, this unpredictability places an undue burden on disaster survivors and local governments, and complicates already onerous programs with many counties relying on loans to cover recovery costs; and

WHEREAS, rising interest rates can further increase financial strain, potentially affecting county credit ratings, particularly in smaller or rural areas; and

WHEREAS, Congress can prevent disruptions in recovery and ensure communities receive timely support after disasters by fully funding the DFR, helping Counties avoid significant challenges in addressing both immediate and long-term recovery needs; and

WHEREAS, Congress is urged to address the current shortfall by replenishing the Disaster Relief Fund (DRF) through the Continuing Resolution (CR) under negotiation; and


WHEREAS, Congress is requested to include an additional \$10 billion in disaster relief to support ongoing recovery efforts and prevent future funding gaps; and

WHEREAS, the Town of Archer Lodge requests that Congress backfill the \$6.1 billion in projects halted due to the transition to Immediate Needs Funding (INF) and ensure these funds are available; and


WHEREAS, the Town of Archer Lodge asks Congress to include provisions to avoid the need for INF next year, ensuring more stable and predictable funding for disaster recovery; and

NOW, THEREFORE, BE IT RESOLVED, that the Town of Archer Lodge Town Council unequivocally expresses its support and endorsement for Congress to fully fund the Disaster Relief Fund, and backfill all projects halted due to the transition to Immediate Needs Funding, including provisions to avoid the need for Immediate Needs Funding in the coming years.

DULY ADOPTED ON THIS 7th DAY OF OCTOBER 2024, WHILE IN REGULAR SESSION.


_____(SEAL)
Matthew B. Mulhollem
Mayor

ATTEST:


_____(SEAL)
Jenny Martin
Town Clerk





TOWN OF ARCHER LODGE
RESOLUTION SUPPORTING OPERATION GREEN LIGHT FOR VETERANS

WHEREAS, the residents of the Town of Archer Lodge have great respect, admiration, and the utmost gratitude for all of the men and women who have selflessly served our country and this community in the Armed Forces; and

WHEREAS, the contributions and sacrifices of the men and women who served in the Armed Forces have been vital in maintaining the freedoms and way of life enjoyed by our citizens; and

WHEREAS, the Town of Archer Lodge seeks to honor these individuals who have paid the high price for freedom by placing themselves in harm's way for the good of all; and

WHEREAS, Veterans continue to serve our community in the various Veterans Services Organizations, religious groups, civil service, and by functioning as County Veteran Service Officers in 29 states to help fellow former service members access more than \$52 billion in federal health, disability and compensation benefits each year; and

WHEREAS, Approximately 200,000 service members transition to civilian communities annually; and

WHEREAS, an estimated 20 percent increase of service members will transition to civilian life in the near future; and

WHEREAS, studies indicate that 44-72 percent of service members experience high levels of stress during transition from military to civilian life; and

WHEREAS, Active Military Service Members transitioning from military service are at a high risk for suicide during their first year after military service; and

WHEREAS, Johnston County encourages all municipalities to recognize Operation Green Light for Veterans; and


WHEREAS, the Town of Archer Lodge appreciates the sacrifices of our United States Military Personnel and believes specific recognition should be granted.

NOW, THEREFORE, BE IT RESOLVED, the Town Council of the Town of Archer Lodge, North Carolina, hereby declares from October through Veterans Day, November 11, 2024, a time to salute and honor the service and sacrifice of our men and women in uniform transitioning from Active Service; and

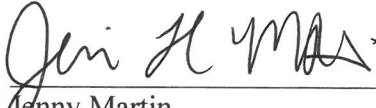
BE IT FURTHER RESOLVED, that in observance of Operation Green Light, the Town of Archer Lodge encourages its citizens in patriotic tradition to recognize the importance of honoring all those who made immeasurable sacrifices to preserve freedom by displaying a green light in a

window of their place of business or residence, and further encourages all municipalities within Johnston County to display green lighting, wherever possible, at public buildings.

DULY ADOPTED ON THIS 7th DAY OF OCTOBER 2024, WHILE IN REGULAR SESSION.


_____(SEAL)
Matthew B. Mulhollem
Mayor

ATTEST:


_____(SEAL)
Jenny Martin
Town Clerk



Town of Archer Lodge
Fiscal Year Ending June 30, 2025



Budget Amendment # BA 2025 02
Date: 07-Oct-24

General Fund

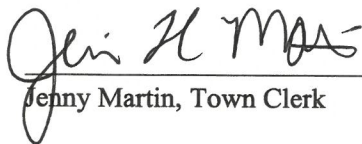
Account	Account Number	Budget	Amendment	Amended Budget
Revenues:				
Gen/Fund Balance Appropriated	10-3990-0000	297,550.00	56,405.00	353,955.00
Total Increase (Decrease) in Revenues			56,405.00	
Expenditures:				
Gen/Public Buildings/Professional Fees	10-4190-1900	10,000.00	3,850.00	13,850.00
Gen/Public Buildings/Contracted Services	10-4190-3500	35,000.00	29,585.00	64,585.00
Gen/Planning_Zoning/Contracted Services	10-4910-3500	28,000.00	20,500.00	48,500.00
Gen/Parks & Recreation/Small Equipment & Furnishings	10-6120-5000	6,000.00	2,470.00	8,470.00
Total Increase (Decrease) in Expenditures			56,405.00	
			-	

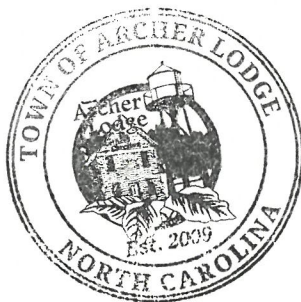
Justification for Budget Amendment:


To appropriate or reappropriate unanticipated revenues and expenditures as recorded.

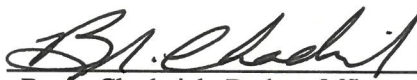
Adopted this 7th day of October 2024

ATTEST:


Jenny Martin, Town Clerk




Matthew B. Mulhollem, Mayor


Bryan Chadwick, Budget Officer



Work Session - Minutes Monday, October 21, 2024

COUNCIL PRESENT:

Mayor Mulhollem

Mayor Pro Tem Castleberry
Council Member Bruton

Council Member Jackson

Council Member Purvis

STAFF PRESENT:

Kim P. Batten, Assist. Town Admin./Finance Officer

Marcus Burrell, Town Attorney

Jason Kress, Town Planner

Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

Council Member Wilson

STAFF ABSENT:

Bryan Chadwick, Town Administrator

Page

1 WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2 DISCUSSION OF TOWN COUNCIL VACANT SEAT:

a) Mayor Mulhollem reminded everyone that this agenda item was removed from the Monday, October 7, 2024, Regular Council Meeting Agenda due to the absence of Council Member Bruton. He expressed appreciation for the number of applicants that applied for the vacant seat before opening the floor for discussion.

Ms. Batten shared various options for Council to use to cast their vote.

Attorney Burrell explained the options for voting and the strict procedures required for appointing a person in an elected official seat. Discussion throughout the session.

It was the consensus of the Council to use a voting ballot and select one candidate from a list of all the candidates. They agreed to add the election of a Council Member to the Monday, November 4, 2024, Regular Town Council Agenda.

3 ASSISTANT TOWN ADMINISTRATOR/FINANCE OFFICER'S REPORT:

a) Interim Financial Reports for September 2024

Ms. Batten shared an interim summary for all funds ending September 30, 2024. She shared that we are around 9.5% collected for the fiscal year. Ms. Batten shared that expenditures are less than 25%.

Regarding the Capital Reserve Fund, Ms. Batten mentioned that the only transaction for the month is the investment earnings.

Regarding the Park Reserve Fund, Ms. Batten mentioned that the only activity for the month is the investment earnings as well as the \$0.02 transfer from the taxes.

Regarding the Public Safety Reserve Fund, Ms. Batten mentioned that the only activity for the month is the investment earnings.

When comparing revenues in September 2023 with September 2024 in the General Fund, Ms. Batten mentioned that we were around \$109,000 lower this year. When comparing expenditures between the two years, Ms. Batten shared that we were about \$26,000 less in expenditures this year.

4 STAFF GOALS:

a) Town Planner ~ Jason Kress

Mr. Kress shared and discussed the following Planning and Zoning Goals for 2025:

1. **Education**
 - a. Complete Certified Zoning Official certification.
 - b. Continue seeking out and taking relevant courses to further my education in the Planning field.
2. **Community Engagement**
 - a. Seek out methods and processes to increase community involvement in our plans and vision for the Town as we continue to grow.
3. **Economic Development/Growth Study**
 - a. Research similar municipalities that have been/are on a similar trajectory and how they managed growth. Take best practices and synthesize them into an actionable plan.
 - b. Research Economic Development strategies to find the best options for the Town.
 - c. Look at the Town of Carrboro, as they were in a similar spot to the Town of Archer Lodge, and get some ideas on how they were able to grow.
4. **Farmland Protections**
 - a. Programs for Voluntary Agricultural Districts
 - b. Conservations Easements
 - c. Make connections with the North Carolina State Farmlink
 - d. Johnston County is currently at the biggest risk for losing the most farmland in the state if things continue on their current trajectory.

Mr. Kress discussed the importance of the Town having an identity instead of just being a location that people drive through to get to another highway. Discussion followed.

Mr. Kress asked Council to contact him with any questions or concerns.

5 - 6

b) Assistant Town Administrator/Finance Officer ~ Kim Batten

Ms. Batten shared that her goal as a Finance Officer is to increase the General Fund Balance.

She provided the charts attached below and gave an explanation of the General Fund Balance, Capital Reserve Fund, the Public Safety Reserve Fund, Grant Funds and Project Funds. Ms. Batten expressed the risks of coming up short in each fund and how it affects the Town. Discussion followed.

Ms. Batten shared information on the upcoming Part-Time Executive Assistant position that is to be filled prior to the retirement of Deputy Town Clerk, Joyce Lawhorn, who will be retiring in December 2024. She shared that Staff cross-trains several of their job tasks, and expressed the need to have a person in place at Town Hall that would be able carry on her duties as a Financial Officer if for any reason she couldn't work.

[Financial Charts](#)

c) Parks & Recreation Director ~ Chris Allen

Mr. Allen shared and discussed his 2025 Goals for the Parks & Recreation Department as follows:

1. Enhance Community Engagement

- Host regular community events and workshops to gather feedback.
- Develop partnerships with local schools, businesses, and organizations.

2. Improve Facility Maintenance and Safety

- Conduct a comprehensive assessment of all parks and facilities.
- Create a regular maintenance schedule to ensure safety and cleanliness.

3. Expand Program Offerings

- Introduce new recreational programs tailored to various age groups and interests.
- Offer seasonal activities, such as summer camps and holiday events.

4. Increase Accessibility

- Ensure all facilities and programs are accessible to people with disabilities.
- Develop inclusive programming that caters to diverse community needs.

5. Promote Environmental Sustainability

- Implement green practices in park maintenance (e.g., recycling, native planting).
- Organize community clean-up days and educational workshops on conservation.

6. Improve Communication and Marketing

- Develop a user-friendly website and active social media presence to promote events and programs.
- Create a quarterly newsletter to keep the community informed.

7. Build a Strong Volunteer Program

- Recruit and train volunteers for events, maintenance, and program support.
- Recognize and celebrate volunteer contributions to the community.

8. Evaluate and Adjust Programming

- Implement a system for regular program evaluation and feedback collection.
- Use feedback to adapt and improve offerings based on community needs.

9. Foster Health and Wellness

- Promote physical activity through fitness classes and outdoor activities.
- Collaborate with health organizations to provide wellness resources.

10. Secure Funding and Resources

- Explore grants, sponsorships, and fundraising opportunities to support initiatives.
- Develop a budget that aligns with the department's goals and priorities.

Discussion followed.

Mr. Allen shared that he would send a copy of his goals to the Council.

5 ADJOURNMENT:

- a)** With no further business, Mayor Mulhollem called for a motion to adjourn the meeting.

Moved by Council Member Jackson

Seconded by Mayor Pro Tem Castleberry

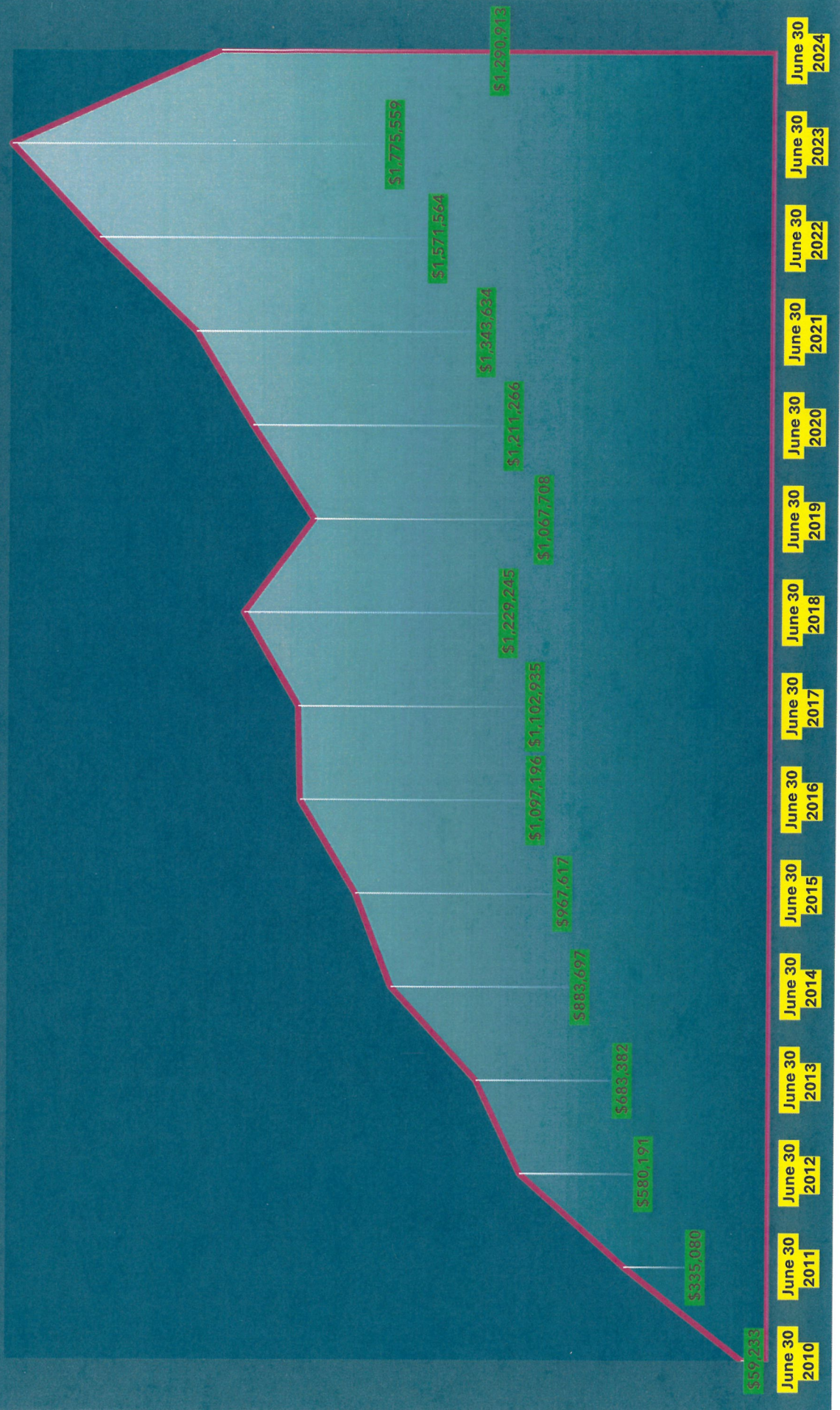
Approved to adjourn the meeting at 7:59 p.m.

CARRIED UNANIMOUSLY

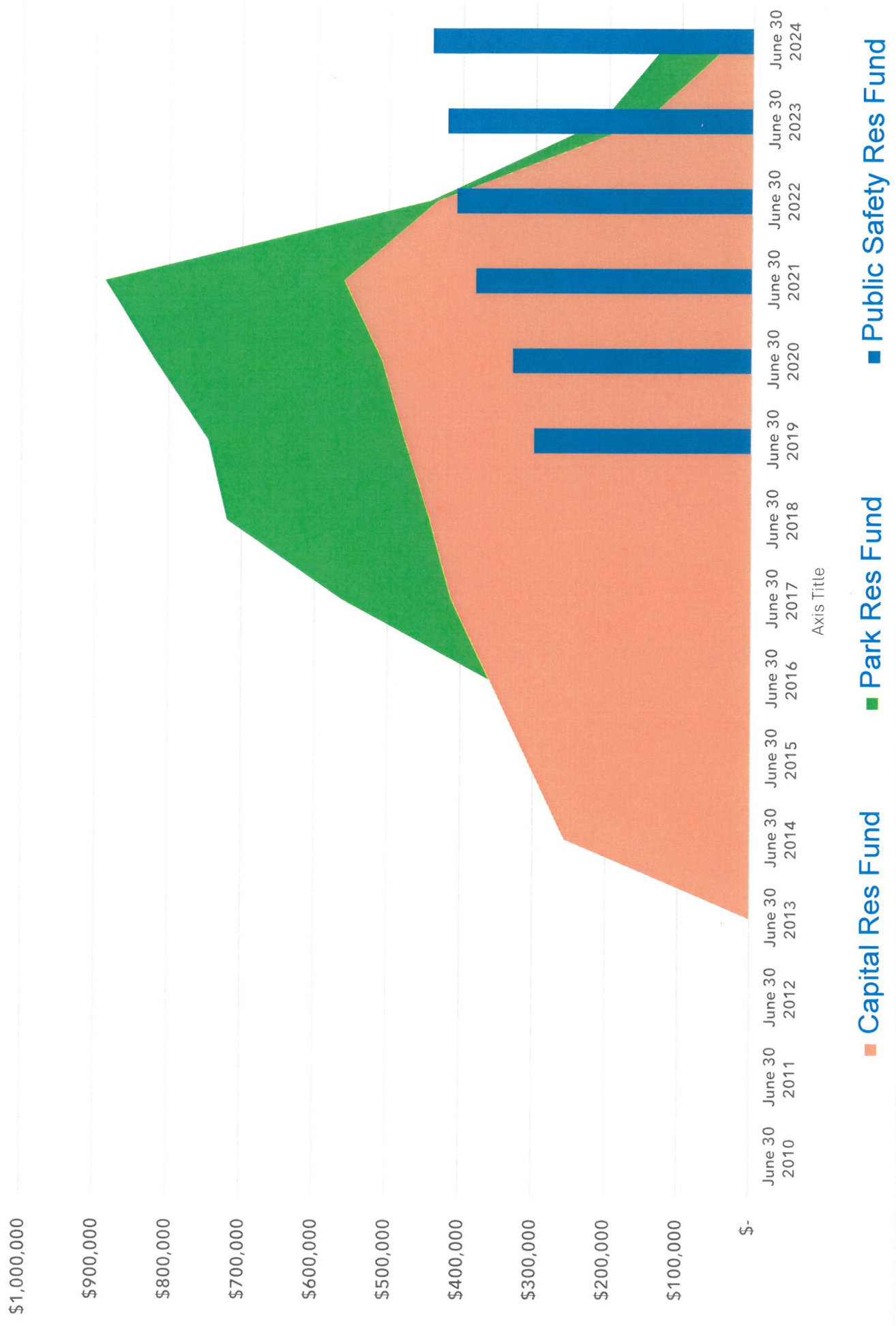
Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk

GENERAL FUND TOTAL FUND BALANCE



Capital Reserve Fund, Park Reserve Fund & Public Safety Reserve Fund Balances





Regular Council - Minutes Monday, November 4, 2024

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None
Page

MEDIA PRESENT:

None

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No additions or changes.

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved the Agenda

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

a) No Public Comments.

4. CONSENT AGENDA:

a) Approval of Minutes:

07 Aug 2023 Regular Council Meeting Minutes

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved the Consent Agenda

5. RECOGNITION:**a) Moment of Silence Honoring James Purvis, III (Jim)**

Mayor Mulhollem lit the candle to pay tribute and honor former Council Member Jim Purvis and paused for a moment of silence. While photos of Mr. Purvis were being shown, he asked Council and Staff to share some of their memories of him.

b) Sharing Memories of James Purvis, III (Jim)

Memories shared:

- Council Member Wilson commended Mr. Purvis for serving on the Planning Board, Town Council, and various other committees during the early beginning of the Town. He shared that what stood out most to him was his participation and dedication for the Archer Lodge Veterans Committee and helping establish the Veterans Memorial in Archer Lodge. He add that Mr. Purvis was a good man.
- Council Member Jackson reiterated Mr. Wilson's comments and reflected on their conversations and love for Mardi Gras and one being held in the Town. He shared that Mr. Purvis was a nice guy, kind and good hearted. He commended Mr. Purvis for visiting the prison to minister to inmates on death row. Mr. Jackson shared during the final time of declining health and he care for his wife, Ms. Teresa Purvis. Council Member Jackson shared that he and the youth group from White Oak Baptist Church went to his house and did yard work for him. He expressed that he will miss Mr. Purvis' presence.
- Attorney Burrell shared that he met Mr. Purvis when he was a member of the Town Planning Board and reflected on their conversation when he moved up to Town Council and jokingly telling him that he had been promoted to the Big Leagues. When Mr. Burrell became Town Attorney he sat next to Mr. Purvis. on the Town Council. He expressed that Mr. Purvis was the kindest and most humble person he had ever interacted with. He commended Mr. Purvis for his service to the Town and expressed that he would be missed.
- Mayor Mulhollem reflected on Mr. Purvis' early years of volunteering with the Veterans Committee, his commitment, and him sharing with the RA's (Royal Ambassadors, mission study education program for local, domestic, and foreign) in his church. He shared that Mr. Purvis was a very passionate volunteer and missionary in the prison system. He informed that Central Prison was the primary prison where he worked with a group called Kairos, and help to developed a group called Short Journey, which specialized in working with prisoners on death row. Mayor Mulhollem expressed how much Mr. Purvis was encouraging and added that even though he didn't say a lot during the meetings, when he spoke everyone listened. He added that Mr. Purvis will be missed.
- Mayor Pro Tem Castleberry jokingly shared that Mr. Purvis did not like green Skittles candy. He shared that Mr. Purvis prepared himself for any decisions to be made for Council and communicated with other Council Members before making a final decision. He noted that Mr. Purvis contacted him during his sickness to see how he was doing. He expressed that he was a wise man and taught him a lot. He added that he will remembered for a long time.
- Council Member Bruton reiterated what had been said and shared that she loved bouncing ideas off of him and then come to a conclusion. She shared that he was very smart and a nice guy. She added that even going through what he was going through, he wanted to relay his thoughts on the future for Archer Lodge and had concerns for the direction it was going in.
- Ms. Batten shared that Mr. Purvis was the most engaged Council

Member that she had ever worked with. She commended him for his visits to Town Hall, volunteering to lower the flags at Town Hall and the Archer Lodge Community Center in a timely manner. She shared his love for Staff and that he would bring goodies for them to enjoy. She shared that he always communicated with the Town and was a good listener and that his heart was with Archer Lodge. Ms. Batten added that he cared so much for the Town that he would be a hard man to replace.

- Mr. Chadwick agreed with Ms. Batten's comments. He shared that he has managed for a dozen+ years but Mr. Purvis and one other person stood out due to communicating and engaging with Staff regarding questions and concerns to be more informed or just shared their thoughts. He shared that Mr. Purvis knew his purpose in life. He knew what he needed to do and took ownership of every decision he made, never backing down, it was not what was in his interest and better for him, but for the betterment of the Town. He looked beyond himself and saw the bigger picture, and stayed in touch with Staff to make sure they were doing well. He added that service was his life and reason. Mr. Chadwick expressed that it was a true honor to serve this Town with him.
- Mr. Allen shared that he was fairly new with the Town, and he felt that Archer Lodge has lost its' soul and that the impact of Mr. Purvis will forever be felt especially in Town Hall due to not having him to visit with. He shared that he got to personally know him during his visits to the Town Park. Mr. Purvis would talk with him extensively, and he was very empathetic and that they had a lot in common. Mr. Allen shared that he would miss Mr. Purvis and their talks.
- Mr. Kress shared that regrettably he only had a short time with Mr. Purvis, but in that time you could know and feel the care and love he had for the Town, and everyone in it. He expressed that it was important to have those types of people that can be a guiding light and a strong present, that have the strength and wisdom and faith to guide them through tough places on behalf of the Town. He expressed that Mr. Purvis was a great sight to see when he would stop by Town Hall to check on him and was very welcoming. He added that he will definitely be missed.
- Ms. Lawhorn shared that she would miss Mr. Purvis coming in Town Hall with his bright colored shirts on and how it would brighten everyone's spirits. She shared that he was precious, he did a lot for the Town, and was very smart. Ms. Lawhorn reflected on him coming in Town Hall and sharing with everyone about his visits to the doctor and saying that he was in good shape and wasn't on any medicines. When his health suddenly started to decline it was such a shock to all of Staff. She expressed how he would put others first instead of himself and that she was thankful to have had to opportunity to get to know him.
- Ms. Martin piggybacked on what had already been shared and added that Mr. Purvis would come to Town Hall to not only discuss business or ask questions, but he checked on Staff to see if everyone was doing well. She said that Mr. Purvis genuinely cared about others. Ms. Martin added that Mr. Purvis would surprise Staff with sweet treats to show that he was thinking about everyone. She shared that Mr. Purvis will be missed.

6. PRESENTATION:

9 a) Proclamation - Veterans Day 2024

Mayor Mulhollem read the proclamation.

The signed proclamation is attached below.

[Proclamation - Veterans Day 2024 Signed](#)

7. DISCUSSION AND POSSIBLE ACTION ITEMS:

- 10 a) Discussion and Possible Action of Approving the Resolution Adopting the 2025 Town Council Meeting Schedule (Resolution# AL2024-11-04a)**

Mayor Mulhollem shared his thoughts regarding the calendar and mentioned that the dates are similar to previous years. Ms. Jenny Martin agreed that the calendar is similar to previous dates on which meetings have been held. She noted that there were only two months out of the calendar that are different and proposed to Council how they would like to schedule these meetings since there were holidays that fall close in line to the dates of the meetings. It was discussed and agreed to change the meeting from July 7th to July 14th. The second meeting discussed was September and it was decided that the meeting would be held September 8th instead of September 1st to avoid conflicts with the holiday.

The signed Resolution# AL2024-11-04a is attached below.

Moved by Council Member Wilson Seconded by Council Member Jackson

Approved the Resolution Adopting the 2025 Town Council Meeting Schedule as Presented to Include the Council Meetings to be held July 14, September 8, and September 22. (Resolution# AL2024-11-04a)

CARRIED UNANIMOUSLY

[AL2024-11-04a Resolution Adopting the 2025 Town Council Meeting Schedule Signed](#)

- 11 b) Discussion and Possible Action of Approving the Resolution Adopting the 2025 Holiday Schedule (Resolution# AL2024-11-04b)**

Mayor Mulhollem mentioned that it is his understanding that the Town follows the County's holiday schedule which in turn follows the state's holiday schedule. Council Member Bruton mentioned that Staff are losing a few holidays as Town Hall is closed on Fridays. Discussion followed.

The signed Resolution# AL2024-11-04b is attached below.

Moved by Council Member Jackson Seconded by Mayor Pro Tem Castleberry

Approved the Resolution Adopting the 2025 Holiday Schedule (Resolution# AL2024-11-04b)

CARRIED UNANIMOUSLY

[AL2024-11-04b Resolution Adopting the 2025 Holiday Schedule Signed](#)

- c) Discussion and Possible Action of Approving the Updated Memorandum of Understanding (MOU) Between the Town of Archer Lodge and Johnston County Little League**

Mr. Chadwick shared that there was only one change requested by Johnston County Little League (JCLL) on the proposed MOU and it is located in Section b. xiii. Use of Town maintained fields for regular season games and practices/All Star practices after the Spring Season without being charged the fees associated with the Town Fee Schedule. Discussion followed regarding the specifics of maintaining the fields and the availability. Mr. Allen shared that he will be communicating more with JCLL and entities that are wanting to use the fields and noted that the duration of the JCLL practices would run from the middle of June to July 4th, approximately a month. Mayor Mulhollem and Mr. Allen agreed that things are running more smoothly now and will be more productive going forward. Mr. Allen noted that the Town scheduling takes first priority due to the need for revenues and JCLL will be second when scheduling the fields. Attorney Burrell explained that guidelines run through Mr. Allen for approved scheduling for practices, evaluations, and special events. Anything that JCLL does must go through Mr. Allen first. Discussion followed. It was the consensus of Staff and Council that Mr. Allen

would be managing scheduling for all games and practices.

Moved by Council Member Wilson Seconded by Mayor Pro Tem Castleberry

Approved the Updated Memorandum of Understanding (MOU) Between the Town of Archer Lodge and Johnston County Little League, as presented

CARRIED UNANIMOUSLY

d) Discussion and Possible Action of Filling Vacancy on the Town Council and Appoint the New Town Council Member, if necessary.

Mayor Mulhollem announces to the Council that they will be holding a vote via ballot as previously decided. The Council Members are to select one box and sign their ballot. Once finished they are to pass their ballot to the Town Attorney. Mayor Mulhollem explained that the town is very lucky to have had such an amazing turn out for the interest in the vacancy for Town Council. He thanked all that were interested in the position for their willingness to serve their town.

Town Attorney Marcus Burrell announced that the ballots had been completed. The tallies of the votes were as follows: Hearbert Locklear, 1 vote. Teresa Romano, 1 vote. John Buzzelli, 2 votes.

Mayor Mulhollem called for a motion.

Moved by Council Member Jackson Seconded by Council Member Bruton

Approved to Appoint John Buzzelli as New Town Council Member

CARRIED 3 TO 1 (Mayor Pro Tem Castleberry Opposed)

12

e) Oath of Town Council Member, if necessary.

John Buzzelli was invited to the front of chambers to be given an oath. Council Member Jackson was invited to hold the Bible. John Buzzelli was asked to recite the oath which was given by Mayor Mulhollem.

The signed Oath is attached below.

[Oath of Town Council Member John T. Buzzelli Signed](#)

f) Discussion and Possible Action of Appointing or Reappointing Three Planning Board Members/Board of Adjustment Members for a Three-Year Term Beginning January 2025- December 2027

Mayor Mullholem announced that there were three openings on the Planning Board and that there are four interested parties. Chris Cipriani and John Oglesby are current members of the Board that are re-applying for their positions. Discussion followed. Mayor Mulhollem invited any member of the Council to propose a motion as he is only to vote in the case that there is a tie. Discussion followed. It was decided to select Chris Cipriani, John Oglesby, and Francine Echols (as a condition that she is eligible due to her position as a Judge).

Moved by Council Member Jackson Seconded by Council Member Bruton

Appointing or Reappointing Chris Cipriani and John Oglesby and Conditionally Approve Francine Echols as Planning Board Members/Board of Adjustment Members for a Three-Year Term Beginning January 2025- December 2027 As Presented

CARRIED 4 to 1 (Mayor Pro Tem Castleberry Opposed)

8. TOWN ATTORNEY’S REPORT:

a) Marcus Burrell reminded everyone in attendance to go vote

tomorrow if anyone has not yet voted.

9. TOWN ADMINISTRATOR'S REPORT:

- a) **Bryan Chadwick reminded everyone that the Veteran's Memorial Day Service will be held by the County at Smithfield-Selma High School. Council Member Wilson mentioned that he will be present at our memorial. Discussion followed.**

Mr. Chadwick encouraged everyone to get out and vote.

10. HUMAN RESOURCES OFFICER/TOWN CLERK'S REPORT:

- a) **Jenny Martin provided the Human Resources Officer/Town Clerk Report as follows:**

- Ms. Martin explains that they are looking to hire a part-time Athletic Aide to assist with basketball season and for recreation activities as needed.
 - The Executive Assistant position has closed. There were 23 applicants narrowed down to 12. Ms. Kim Batten narrowed it down to 7. They are going to be reaching out to schedule interviews with those 7 individuals.
 - Ms. Martin shared the new law that North Carolina has release to prevent the view and use of pornography on government devices. She announced that she will be updating the electronic use policy to be presented in December and put into effect by January. Discussion followed.
-

11. PARK AND RECREATION DIRECTOR'S REPORT:

- a) **Chris Allen provided the Parks and Recreation report as follows:**

- Winter basketball is in enrollment with approximately 30 kids in 5 leagues.
 - Fall seasons are over and there will be Senior Boys playing baseball at Corinth Holders.
 - Parks and Recreation staff are getting credited and certifications as well as attending conferences.
 - Blake McLean will be certified to teach archery this winter. More adults are interested than kids at this point in time.
 - Mayor Mulhollem congratulated Mr. Allen in publishing his first article in the National Parks and Recreation Magazine. He shared that the is going to be publishing a second article in the coming months.
-

12. TOWN PLANNER'S REPORT:

- a) **Jason Kress provided the Town Planners Report as follows:**

- CAMPO will be coming by to do a presentation on their Blueprint for Safety, including some information for Archer Lodge specifically.
- He reminded the Council of the resident that he had discussed with them previously that would like to build a garage on their land. Mr. Kress mentioned that he had discussed with Attorney Burrell that there may be a need to change the ordinances to provide for this type of construction, as this issue has been discussed and revisited several times with several different residents. As of right now, the solution to this issue would be to have a special meeting for a variance application. Mr. Kress explained that as time goes on, this may

become a tedious issue to continue to address with a special meeting especially if the ordinances can be changed to resolve this issue. Discussion followed.

13. MAYOR'S REPORT:

a) Mayor Mulhollem provided the Mayor's report as follows:

- Mayor Mulhollem reminded everyone to get out and vote if they have not had a chance to.
 - He mentioned Veteran's Day and wished everyone a Happy Thanksgiving. He also invited everyone to the December 7th parade and tree lighting. Mayor Mulhollem mentioned that he will miss Jim Purvis and his tradition of throwing beads. He mentioned that after the parade the tree lighting will be held. He explained that the board at the Archer Lodge Community Center has requested different organizations to provide chili for a type of chili cook off and table presentation competition.
 - Mayor Mulhollem welcomed John Buzzelli to the Council.
-
-

14. COUNCIL MEMBERS' REMARKS:

a)

Council Member Buzzelli expressed his excitement to be working with the Town. He expressed how Mr. Purvis will be missed. He stated that he is excited to work with Chris Allen in Parks and Recreation. He looks forward to being a part of the Council and shared how much him and his wife love the Town itself.

b)

Council Member Wilson warned everyone of the 2025 cars that have been recalled and sang a song.

c)

Council Member Jackson mentioned that November 10th is the Marine Corps birthday and November 11th is Memorial Day where he plans to come to the memorial with Council Member Wilson. He played a voicemail from Jim Purvis where he shared that he would like John Buzzelli to take his place on the Council and let Council Member Buzzelli know that he would have welcomed him too.

d)

Mayor Pro Tem Castleberry congratulated Council Member Buzzelli. He shared that he had signed up for a class on strategic planning with over 200 people across North Carolina. There was a speech given at the class that he wanted to share. The person giving the speech said that in order to grow, we have to slow down somewhere else. Mayor Pro Tem Castleberry stated that we need to be ready and prepared. He shared that classes can give you a different mindset and that there may be a different way to keep this Town moving forward.

e)

Council Member Bruton welcomed John Buzzelli to the Council. She shared that she had received the same message from Jim Purvis.

15. ADJOURNMENT:

- a) Having no further business, Mayor Mulhollem called for a motion to adjourn.**

Moved by Council Member Jackson Seconded by Mayor Pro Tem Castleberry

Approved to adjourn the meeting at 8:36 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



Proclamation



VETERANS DAY - 2024

WHEREAS, for decades America has paused on the 11th of November, the anniversary of the armistice that concluded World War I, to remember and to honor our veterans of military service in proud and grateful recognition of the hardships and sacrifices by the millions of men and women who have defended our land in war and in peace; and

WHEREAS, the freedoms we enjoy have been purchased and maintained at a high price, as Americans have been willing, throughout our history, to fight and die to preserve their individual rights as guaranteed in the United States Constitution and the Bill of Rights; and

WHEREAS, Americans owe a great debt to all those who have served in defense of this nation throughout the generations; for their sacrifices, often resulting in permanent injury or death, which have preserved our unique form of government dedicated to human rights and respect for the individual, and preserved our freedoms and promise of liberty as an example for oppressed persons of the world; and

WHEREAS, in honor of these dedicated men and women, we pledge our continued defense of our nation so that their sacrifice will stand before the entire world as a tribute to the spirit and determination of a people dedicated to the principle of freedom and democracy.

NOW, THEREFORE, LET IT BE PROCLAIMED by the Honorable Mayor and the Town Council of the Town of Archer Lodge, North Carolina, that November 11, 2024 be recognized as

Veterans' Day

The town encourages citizens to commend its observance.

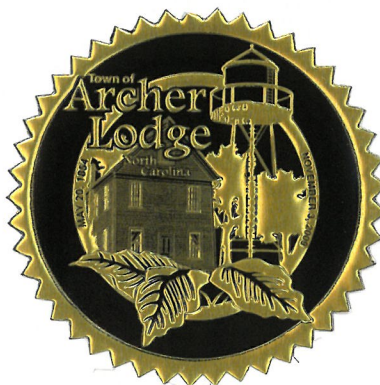
Proclaimed this the 4th day of November 2024.

A handwritten signature in black ink, appearing to read "Matthew B. Mulhollem".

Matthew B. Mulhollem
Mayor

ATTEST:

A handwritten signature in black ink, appearing to read "Jenny Martin".

Jenny Martin
Town Clerk



**TOWN OF ARCHER LODGE
RESOLUTION ADOPTING THE 2025
TOWN COUNCIL MEETING SCHEDULE**

WHEREAS, the Archer Lodge Town Council exists to conduct the business of the citizens; and

WHEREAS, the Regular Town Council meetings for the Archer Lodge Town Council are held the first Monday of the month at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers, unless otherwise noted; and

WHEREAS, the Work Sessions for the Archer Lodge Town Council are held the third Monday of the month at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers, unless otherwise noted; and

WHEREAS, each meeting of the Archer Lodge Town Council is open to the public, except as provided by NC G.S. 143-318.11; and

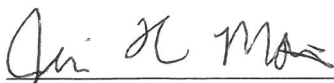
WHEREAS, the Archer Lodge Town Council may amend the yearly meeting schedule in accordance with NC G.S. 143-318.12:

TOWN OF ARCHER LODGE 2025 CALENDAR TOWN COUNCIL MEETINGS			
MONTH	REGULAR MEETING	WORK SESSION	BUDGET RETREAT
January	Monday, Jan 6		Thursday, Jan 23
February	Monday, Feb 3		Monday, Feb 17
March	Monday, Mar 3		Monday, Mar 17
April	Monday, Apr 7	Monday, Apr 21	
May	Monday, May 5	Monday, May 19	
June	Monday, Jun 2	Monday, Jun 16	
July	Monday, Jul 14		
August	Monday, Aug 4		
September	Monday, Sep 8	Monday, Sep 22	
October	Monday, Oct 6	Monday, Oct 20	
November	Monday, Nov 3	Monday, Nov 17	
December	Monday, Dec 1		


NOW, THEREFORE, BE IT RESOLVED that the Archer Lodge Town Council hereby adopts the 2025 Town Council Meeting Schedule as presented.

DULY ADOPTED ON THIS 4th DAY OF NOVEMBER 2024 WHILE IN REGULAR SESSION.

ATTEST:


Jenny Martin
Town Clerk



 (SEAL)
Matthew B. Mulhollem
Mayor



**TOWN OF ARCHER LODGE
RESOLUTION ADOPTING THE 2025 HOLIDAY SCHEDULE**

WHEREAS, it is the policy of the Town to follow the holiday schedule provided by the State of North Carolina for its employees; and


WHEREAS, the below 2025 Holiday Schedule was retrieved from the State of North Carolina website <https://oshr.nc.gov/state-employee-resources/benefits/leave/holidays#2025-2619>

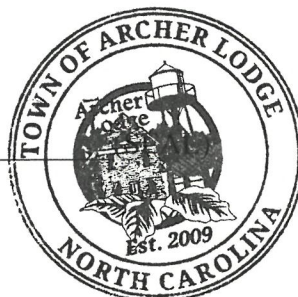
2025 Holiday Schedule		
Holiday	Observance Date	Day of Week
New Year's Day	January 1st	Wednesday
Martin Luther King Jr's Birthday	January 20th	Monday
Good Friday	April 18th	Friday
Memorial Day	May 26th	Monday
Independence Day	July 4th	Friday
Labor Day	September 1st	Monday
Veterans Day	November 11th	Tuesday
Thanksgiving	November 27th & 28th	Thursday & Friday
Christmas	December 24th, 25th & 26th	Wednesday, Thursday & Friday


NOW, THEREFORE, BE IT RESOLVED that the Archer Lodge Town Council hereby adopts the 2025 Holiday Schedule as presented.

DULY ADOPTED ON THIS 4th DAY OF NOVEMBER 2024 WHILE IN REGULAR SESSION.

ATTEST:


Jenny Martin
Town Clerk



 (SEAL)
Matthew B. Mulhollem
Mayor

**OATH OF TOWN COUNCIL MEMBER
TOWN OF ARCHER LODGE**

I, John T. Buzzelli, do solemnly swear (or affirm) that I will support the Constitution of the United States of America; that I will be faithful and bear true allegiance to the State of North Carolina, and to the Constitutional powers and authorities which are or may be established for the government thereof; and that I will endeavor to support, maintain and defend the Constitution of said State, not inconsistent with the Constitution of the United States, to the best of my knowledge and ability.

I, John T. Buzzelli, do swear (or affirm) that I will faithfully and impartially execute the duties of the Office of Town Council Member for the Town of Archer Lodge, North Carolina according to the best of my skills and ability, according to law.



John T. Buzzelli

Sworn to and subscribed before me
this 4th day of November 2024.



Matthew B. Mulhollem,
Mayor





**Work Session - Minutes
Monday, November 18, 2024**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Purvis
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

Page

1 WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mullhollem called the meeting to order at 6:30 p.m in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2 CAMPO PRESENTATION ~ KENNETH WITHROW:

3 - 30

a) Jason Kress introduced Kenneth Withrow from CAMPO and explained why he invited Mr. Withrow to present the "Blueprint for Safety Project" as it is a transportation safety plan that will effect the triangle region. Mr. Kress explained that Mr. Withrow will present information that is specific to Johnston County. Jenny Martin mentioned that she would be forwarding the presentation to the Council Members the next day for their records. Mr. Withrow introduced himself from the Capital Area Metropolitan Planning Organization (CAMPO) and expressed his gratitude for being invited to the meeting. He explained that all counties that are in close proximity to Wake County are a part of CAMPO and shared data regarding crashes within these counties. He shared that the purpose of CAMPO is to ensure that members of these communities have safe access to transportation in which they partner with the North Carolina Department of Transportation. Mr. Withrow continued on to show data for traffic, crashes, and their impacts on transportation. His presentation also included information regarding a metropolitan transportation plan and it's goals for people living in Johnston County. He also explained how important this is for this area of North Carolina due to the exponential growth of the county itself. Mr. Withrow closed his presentation explaining the reason why transportation projects take time to complete, most of which he attributes to timing and funding. (See Attached Presentation)

3 STAFF GOALS (CONTINUED):

a) Human Resources Officer/Town Clerk ~ Jenny Martin

Jenny Martin clarified policies discussed at the last meeting including the Electronics Communication policy and mentioned that the policy would have to be voted on at the upcoming meeting in December. She explained and went over the presentation which included an internal employee satisfaction survey and the goals for the human resources department.

Discussion followed. Council Members requested information regarding the tax rates, budgets, benefits, and raises for the other towns that were provided as comparisons in the presentation.

4 COUNCIL MEMBERS' GOALS:

a) Discussion with Bryan Chadwick regarding the Town Council's goals and vision for the Town

Town Administrator, Bryan Chadwick passed out goals that were discussed during the last budget talks.

Council Member Jackson listed a few things he would like for the Town. These ideas included keeping the small town feel and the big plots of land for homes, increasing the walk-ability of Archer Lodge. Council Member Wilson mentioned that the feeling of the small town of Archer Lodge does not come from the actual size of the Town, but instead comes from the ability of the members of the Town to interact and get along. Mr. Chadwick reminded the Members of Council that Chad stated that the Town is anticipated to double in size over the next 20 years and that there is no way to be able to stop that growth. Discussion followed.

Council Member Castleberry discussed the need for a sewer system for the town of Archer Lodge. He also mentioned that the Town cannot rely on housing and farmland to raise the numbers of the Town. He explained that his vision may need to include working with a neighboring town or the county to bring in a business or two to encourage growth through a commercial addition to the community. Discussion followed.

Mr. Chadwick mentioned that he has been in contact with an engineer that may be able to help the Town get an idea for a figure on what it would cost to create a waste water system so that the Council can decide whether or not it is something that the Town is capable of doing. He mentioned the importance of the Town Council to be able to set their goals and their vision for the community so that they have have projects on the shelf for when funding becomes available. Discussion followed.

5 ADJOURNMENT:

a) With no further business, Mayor Mullhollem adjourned the meeting at 8:12pm.

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



BLUEPRINT FOR SAFETY

CAMPO Regional Transportation Safety Action Plan

Phase 1 Update – Town of Archer Lodge

Agenda

1. Introduction to the Blueprint for Safety
2. Phase 1 Engagement
3. Safety Discussion (interactive)
4. Next Steps



Why plan for road safety?

In CAMPO, between 2018 and 2022...

Over **195,000** total crashes occurred on roadways

More than **2,700** of those crashes seriously injured drivers, passengers, pedestrians, and bicyclists

An additional **654** mothers, fathers, children, brothers, sisters, friends, and loved ones lost their lives due to a roadway crash.





Text here



Why plan for safety NOW?



U.S. Department of Transportation

National Roadway Safety Strategy
Safe Streets and Roads for All (SS4A)



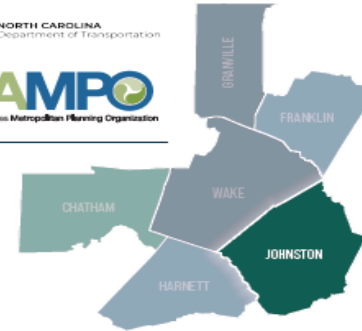
North Carolina Strategic Highway Safety Plan



Public Input
Prior Plans



Why plan for safety NOW?



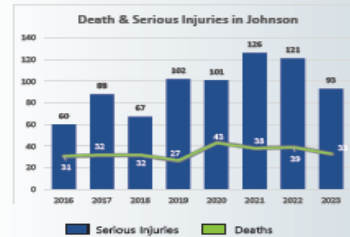
The transportation safety plan focuses on reducing crashes that result in death or serious injury, for all roads and all modes of travel



DID YOU KNOW THAT IN JOHNSTON COUNTY BETWEEN 2019 AND 2023...?

More than **29,800** reported crashes occurred on local and state roadways

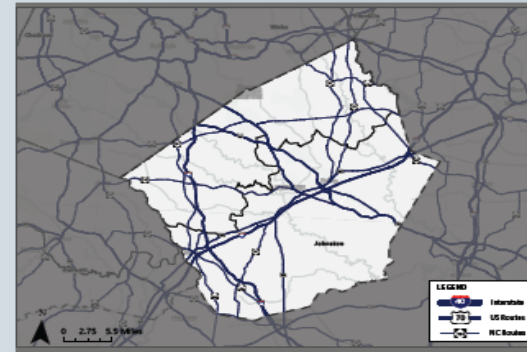
Of those crashes, **more than 900 people** were killed or seriously injured



Fatal and Serious Injury Crashes (2016-2023)

WHERE DO WE PRIORITIZE TRANSPORTATION SAFETY?

Interstates, US routes, or NC routes represent about **12%** of the roadway network in Johnston County, but **more than 51%** of fatal and serious injury crashes occurred on these roads



INTERSTATES, US, AND NC ROUTES

MOST DEATHS AND SERIOUS INJURIES CAN BE PREVENTED IF WE FOCUS ON ...

- Keeping vehicles in the lane
- Reducing conflicts at intersections
- Decreasing drug and alcohol impairment
- Using seat belts and child car seats
- Improving routes and crossings for pedestrians, bicyclists and motorcyclists
- Slowing vehicle speeds



Why plan for safety NOW?



GOAL 7: PROMOTE SAFETY, HEALTH AND WELL-BEING	
OBJ. A	Increase safety of travelers and residents
OBJ. B	Promote public health through transportation choices

Survey Comment Theme

Safety! Bicycle/pedestrian, technology, slower speeds, etc.



A Transportation Safety Plan is...



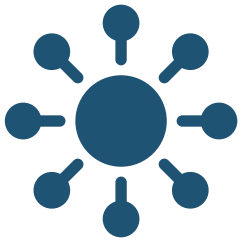
Based on a vision and commitment



Data-driven



Stakeholder-led



Reactive and Proactive



Multimodal



Focuses on short-term needs and long-term goals



Goals for the Safety Plan



Achieve significant reduction in fatalities and serious injuries on the region's transportation system.

Inform other regional efforts

Increase awareness of transportation safety and risks

Identify needs and recommended safety improvements

Ensure consistency with HSIP and USDOT funding programs

Follow a Safe System Approach

Regional Coordination

Several other planning efforts are in process

- Central Pines Regional Council Safety Action Planning
- Durham-Chapel Hill-Carrboro MPO Vision Zero Action Plan
- City of Raleigh Safety Action Plan
- Knightdale Safety Action Plan



Phase 1 Engagement

Engagement Elements

PHASE 1 - December 2023 - August 2024

- Project Website
- Online Survey
- Safety Kick Off Summit
- TAT Phase 1 Meeting
- Social Media Training & Digital Toolkit
- Town Board/City Council Meetings
- Public Engagement Events



Online Engagement

- Project Website
 - <https://publicinput.com/blueprintforsafety>
- Online Survey – **closed in early September**, summarizing results now



Regional Safety Summit

March 14, 2024

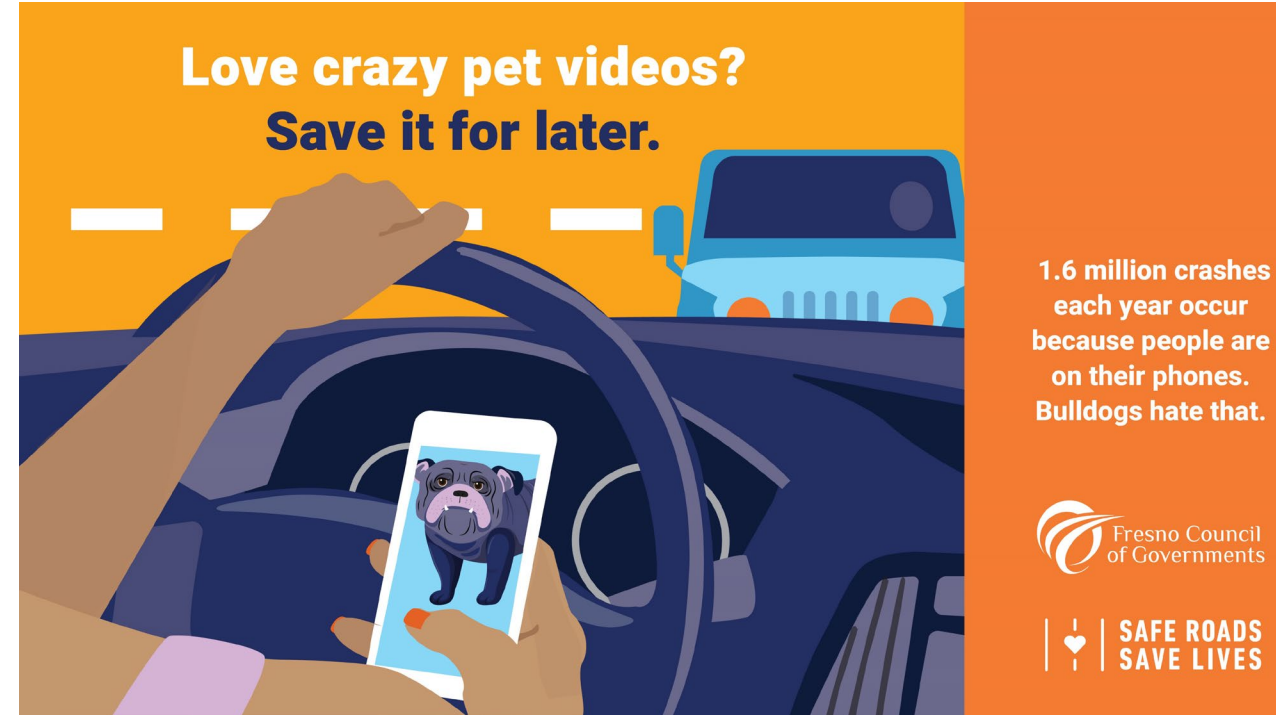
- Introduction to the Plan
- Preliminary Data Review
- Safety Culture
- Plan Engagement
- Small Group Discussions



Regional Safety Summit

Safety Culture

- Top-Down **AND** Bottom-Up
- Everyone:
 - *Shares responsibility*
 - *Does their part*
 - *Understands why it is important*
- A way of life that values the safety of fellow roadway users in every decision we make
 - *Every User*
 - *Every Trip*



Regional Safety Summit

A shared responsibility

- Local Elected Officials
- Planners, Designers, and Engineers
- NCDOT and CAMPO
- Law Enforcement
- Emergency Response
- Universities and Major Institutions
- Parents
- Teachers
- Coaches
- Employers
- Bus Drivers
- Media
- Municipal Maintenance Crews
- ...and so many more.



TAT Meetings

Conversations Across the Region

- May 13th – Garner (Central Wake TAT)
- May 15th – Cary (Western Wake TAT)
- May 23rd – Youngsville (Franklin TAT)
- **May 23rd – Smithfield (Johnston TAT)**
- May 31st – Wake Forest (Northeast Wake TAT)
- June 7th – Butner (Granville TAT)
- June 7th – Lillington (Harnett TAT)



Social Media Training & Digital Toolkit

June 27th, 2024

- Training Recording
- Project Overview Video
- Survey
- Printable Posters
- Media Release
- Email/Newsletter Content
- Social Media Calendar and Posts
- Social Media Reel

ACCESS THE DIGITAL TOOLKIT

Visit <https://www.camponc.us/programs-studies/blueprint-for-safety/digital-toolkit-for-blueprint-for-safety>



Local Engagement Events

June/July Events

- Meet on Main – Wendell (6/21)
- 540 Fest – Raleigh (6/22)
- GoCary and Dorcas Ministries Visit – Cary (6/26)
- Senior Adults Focus Group Meeting - Parks & Rec - Holly Springs (6/29)
- Clayton Farm and Community Market – Clayton (7/13)
- Cary GoCary Customer Appreciation Event (7/17)
- Garner Food Truck Rodeo (7/19)
- Holly Springs Farmers Market (7/20)
- Wake Forest Seniors Coffee Café at Northern Wake Senior Center (7/24)
- Zebulon Popsicles in the Park (7/26)



Local Engagement Events

July/August Events

- Morrisville Western Wake Farmers Market (7/27)
- Christmas in July – Franklinton (7/27)
- Coats Senior Center Meals Distribution (7/30)
- **Flowers Plantation Farmers Market (8/3)**
- Creedmoor City Hall Pop-Up (8/3)
- Community Day - Resources Fair Harnett County - Angier (8/7)
- Youngsville National Night Out (8/9)
- Friday Night on White - Wake Forest (8/9)
- Zebulon Rock the Block Concert (8/9)
- Knightdale Arts & Education Festival (8/17)



Local Engagement Events

August/September Events

- Campbell University Street Fair (8/20)
- Packapalooza - NC State Univ (8/24)
- Logan's Nursery/Garden Hut - Fuquay-Varina (9/6)
- Grasshopper Farms - Wake County (9/7)
- Crosby Community Day - Raleigh (9/14)



Safety Discussion

What does increasing safety look like?

- What are the safety issues observed (infrastructure and behavior) in your community?
- What stands out and different - related to roadway safety for your community compared to the larger region?



Next Steps

Future Engagement

PHASE 2 - September 2024 - June 2025

- CAMPO Executive Board Meeting
- Safety Summit Phase 2
- TAT Phase 2 Meetings
- Town Board/City Council Meetings



Our Next Steps

Analysis and Engagement Summary

- ❑ Finalize analysis for High Injury and Risk Networks
- ❑ Summarize engagement efforts in Phase 1

We need your help to build momentum!

- ❑ Stay involved



Stay Connected

CAMPO: <https://www.campo-nc.us/>

NCDOT Traffic Safety Unit:

<https://www.ncdot.gov/initiatives-policies/safety/traffic-safety/Pages/default.aspx>

Contacts for the Blueprint for Safety

Kenneth Withrow
CAMPO, Senior Transportation Planner
kenneth.withrow@campo-nc.us

Lauren Blackburn
VHB, Project Manager
lblackburn@vhb.com

Catherine Saine
VHB, Transportation Planner
csaine@vhb.com



Thank you

See you soon!



Regular Council - Minutes Monday, December 2, 2024

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Purvis
Council Member Wilson

STAFF PRESENT:

Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Bryan Chadwick, Town Administrator
Jenny Martin, Human Resources Officer/Town Clerk
Joyce Lawhorn, Deputy Town Clerk

COUNCIL ABSENT:

None
Page

MEDIA PRESENT:

None

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:31 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) Mayor Mullhollem requested that numbers on the agenda for item 9 to be changed to 8 and item 8 to be changed to 9.

Moved by Council Member Castleberry
Seconded by Council Member Wilson

Approved Agenda as Amended

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

a) None Present.

4. ORGANIZATIONAL ITEMS:

5 - 6

a) Administration of Oath of Planning Board and Board of Adjustment Member(s) by Mayor Matthew B. Mulhollem

- Francine Echols

- **John F. Oglesby**

Mayor Mulhollem invited Francine Echols and John F. Oglesby to the front of the Council Chambers to administer their oath and confirmed with Ms. Echols and Mr. Oglesby that they were comfortable with receiving their oaths. Mayor Mulhollem also invited Town Administrator, Bryan Chadwick to accompany him in administering their oaths by holding the bible. Jenny Martin took photos of the oaths being administered. Oaths were administered to both Francine Echols and John F. Oglesby simultaneously, each with their left hand on the Bible and right hand raised.

[Francine Echols Oath - Signed](#)

[John Oglesby Oath - Signed](#)

5. DISCUSSION AND POSSIBLE ACTION ITEMS:

7 - 9

a) Discussion and Possible Action of Approving the Updated Electronic Communications and the Use of Town Property and Equipment Policy

Jenny Martin presented the Updated Electronic Communications policy which had been updated to include a pornography policy and explained that this was the only update that was made to the policy.
Discussion followed.

Moved by Council Member Wilson
Seconded by Council Member Jackson

Approval of Updated Electronic Communications and the Use of Town Property and Equipment Policy

CARRIED UNANIMOUSLY

[Electronic Communications and the Use of Town Property and Equipment Policy](#)

6. TOWN ATTORNEY'S REPORT:

a) Town Attorney, Marcus Burrell welcomed new Planning Board members and wished everyone present Happy Holidays.

7. TOWN ADMINISTRATOR'S REPORT:

a) Board of Adjustment

Town Administrator, Bryan Chadwick reminded Council Members that in January there will be a vote held for alternates for the Board of Adjustment.

8. TOWN PLANNER'S REPORT:

a) Planning Board

Town Planner, Jason Kress, discussed possible amendments that were discussed during the last Planning Board meeting. The possible amendments were primarily related to manufactured homes and ordinances directly related to manufactured homes. He also mentioned the possible amendment to ordinances pertaining to accessory structures and their sizes.
Discussion followed.

9. HUMAN RESOURCES OFFICER/TOWN CLERK'S REPORT:

a) Part Time Executive Assistant Position

Jenny Martin, Human Resources Officer, updated the Council on the status of filling the position. She explained that she was pleased with the candidates that they had interviewed and hoped to have a contingent offer issued soon.

b) Joyce Lawhorn Retirement

Bryan Chadwick acknowledged Ms. Joyce Lawhorn's retirement and shared his appreciation for her and all she has done.

10. MAYOR'S REPORT:

a) Mayor Mulhollem expressed his gratitude for Ms. Lawhorn and mentioned how she would be missed as she has been a vital part of the Town.

b) Mayor Mulhollem welcomed new Planning Board members.

c) Mayor Mulhollem announced that there is a new county commissioner that is from the Town of Archer Lodge. He mentioned that this was a proud day in history as this is only the second time in history that there has been a county commissioner from the Town of Archer Lodge.

d) Mayor Mulhollem wishes Council Members and all present a happy and safe holiday season.

11. COUNCIL MEMBERS' REMARKS:

a) Council Member Wilson

Council Member Wilson spoke to Ms. Joyce Lawhorn letting her know that she will be missed. He also wished all in attendance a Merry Christmas and Happy New Year.

b) Council Member Jackson

Council Member Jackson welcomed new Planning Board Members. He also thanked Ms. Joyce for her work for the Town of Archer Lodge. He finished his statements by wishing all in attendance a Happy Holiday Season.

c) Council Member Buzzelli

Council Member Buzzelli expressed how Ms. Joyce Lawhorn will be missed and encouraged her to enjoy her retirement. He wished everyone a Merry Christmas and explained the importance of keeping in mind the reason for the season.

d) Mayor Pro-Tem Castleberry

Mayor Pro-Tem Castleberry let Ms. Joyce Lawhorn know that she is the face

of Archer Lodge and the "real deal". He let her know that seeing her being present and participating in activities with the Town has meant a lot to him. He wished Ms. Lawhorn a healthiest retirement and for asked her to keep Johnny straight.

e) Council Member Bruton

Council Member Bruton expressed her excitement for the new members of the Planning Board. She also spoke to Ms. Joyce Lawhorn letting her know that she always looked at her as a "second mom" to everyone and her gratitude for Ms. Lawhorn always taking care of the members of the Town. She closed her statement by wishing her a happy retirement.

12. ADJOURNMENT:

a) No further Business.

Moved by Council Member Jackson
Seconded by Mayor Pro-Tem Castleberry
Adjourned meeting at 7:12 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

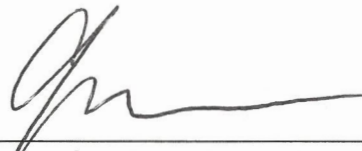
Jenny Martin, Town Clerk

STATE OF NORTH CAROLINA
COUNTY OF JOHNSTON
TOWN OF ARCHER LODGE

**OATH OF PLANNING BOARD MEMBER AND
OATH OF BOARD OF ADJUSTMENT MEMBER
TOWN OF ARCHER LODGE**

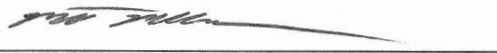
I, **Francine Echols**, do solemnly swear (or affirm) that I will support the Constitution of the United States of America; that I will be faithful and bear true allegiance to the State of North Carolina, and to the Constitutional powers and authorities which are or may be established for the government thereof; and that I will endeavor to support, maintain and defend the Constitution of said State, not inconsistent with the Constitution of the United States, to the best of my knowledge and ability.

I, **Francine Echols**, do swear (or affirm) that I will faithfully and impartially execute the duties of a member of the Planning Board and a member of the Board of Adjustment for the Town of Archer Lodge, North Carolina according to the best of my skills and ability, according to law.



Francine Echols

Sworn to and subscribed before me
this 2nd day of December 2024.



Matthew B. Mulhollem
Mayor
Town of Archer Lodge

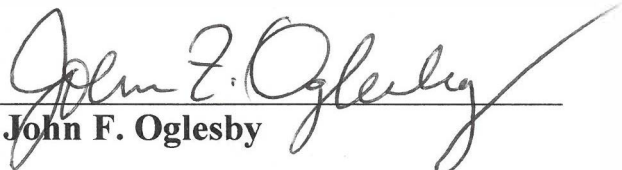


STATE OF NORTH CAROLINA
COUNTY OF JOHNSTON
TOWN OF ARCHER LODGE

**OATH OF PLANNING BOARD MEMBER AND
OATH OF BOARD OF ADJUSTMENT MEMBER
TOWN OF ARCHER LODGE**

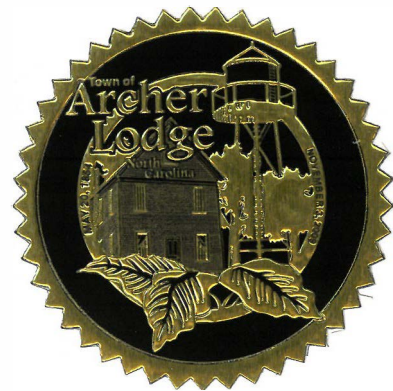
I, **John F. Oglesby**, do solemnly swear (or affirm) that I will support the Constitution of the United States of America; that I will be faithful and bear true allegiance to the State of North Carolina, and to the Constitutional powers and authorities which are or may be established for the government thereof; and that I will endeavor to support, maintain and defend the Constitution of said State, not inconsistent with the Constitution of the United States, to the best of my knowledge and ability.

I, **John F. Oglesby**, do swear (or affirm) that I will faithfully and impartially execute the duties of a member of the Planning Board and a member of the Board of Adjustment for the Town of Archer Lodge, North Carolina according to the best of my skills and ability, according to law.


John F. Oglesby

Sworn to and subscribed before me
this 2nd day of December 2024.


Matthew B. Mulhollem
Mayor
Town of Archer Lodge





TOWN OF ARCHER LODGE

14094 Buffalo Road
Archer Lodge, NC 27527
Main: 919-359-9727
Fax: 919-359-3333

Mayor:

Matthew B. Mulhollem

Council Members:

Clyde B. Castleberry

Mayor Pro Tem

Teresa M. Bruton

J. Mark Jackson

James L. (Jim) Purvis, III

Mark B. Wilson

Electronic Communications and the Use of Town Property and Equipment Policy

This policy applies to all Town of Archer Lodge employees, elected officials, and appointees. The Town maintains electronic communication systems (e.g. voicemail, email, internet access) and provides access to telephones, computers, tablets, cell phones, or other electronic equipment to assist employees while conducting business for the Town. Access to the Town's electronic communication systems and devices requires certain responsibilities and obligations and is subject to relevant Town policies and local, State, and Federal laws.

These electronic communication systems and devices are for business use. Any personal use is limited to reasonable and appropriate use. Brief occasional personal use is permitted if it does not interfere with the user's work or anyone else's work at the Town, have a detrimental effect on the electronic communication systems' and devices' performance, incur any cost to the Town, result in loss of work time, violate or infringe on the right of any other person or entity, constitute a criminal offense or give rise to civil liability, and/or violate any Town policy or regulation. Personal use that is prohibited includes but is not limited to online auctions for personal purchases or sales, any use that would reflect negatively on the Town or its employees, playing games or engaging in on-line gambling, accessing, displaying, and/or transmitting sexually explicit material. Under no circumstances may employees use Town electronic resources and devices to access, receive, or send any material that might be considered offensive including but not limited to pornography, comments or images which could be considered offensive to someone based on their sex, race, religion, national origin, age, disability, or

genetics.

There will be no expectation of privacy for any information gathered, viewed, stored, or maintained on any electronic communication system or device.

The Town will not permit employees, elected officials, or appointees to view pornography on devices owned, leased, maintained, or otherwise controlled by the Town.

The Town will not permit employees to view pornography via the Town's electronic communication systems, including its internet network, regardless of what device is utilized, even if the Town does not own the device.

The Town shall report to the State Chief Information Officer, in the format required by the State Chief Information Officer, annually by August 1st of each year, all unauthorized viewing of pornography on the Town's network or devices.

Certain employees might need to view material that would be considered pornography in order to carry out their official job duties. The Town does not prohibit the viewing of pornography on a Town-issued device or network by any employee who is engaged in any of the following activities in the course of performing their official job duties:

- Investigating or prosecuting crimes, offering or participating in law enforcement training, or performing actions related to other law enforcement purposes;
- Identifying potential security or cybersecurity threats;
- Protecting human life;
- Establishing, testing, and maintaining firewalls, protocols, and otherwise implementing G.S. 143-805;
- Participating in judicial or quasi-judicial proceedings;
- Researching issues related to the drafting of analysis of state laws as necessary to fulfill the requirements of the employee's official duties.

Under North Carolina law, emails sent or received by the Town, except if considered confidential, is considered a public record and is subject to inspection on request by the public. All information created, stored, or transmitted on or with any Town resources is the property of the Town. The Town reserves the right to inspect or audit any documents, emails, or messages sent or received on the Town's equipment. Except as authorized by the Town, employees may not read or listen to any electronic communication intended for others.

Categories of information considered “Confidential” include, but are not limited to:

- Personnel records
- Criminal investigation records
- Legal matters
- Closed session minutes and general accounts
- Social Security numbers or personal financial information
- Contract bid documents until after the contract is awarded

Each employee is responsible for the security and integrity of Town information stored on the computer(s) assigned to the employee. The employee is responsible for controlling access to the electronic system, utilizing supplied virus protection software and ensuring the protection of personal passwords.



**Regular Council - Minutes
Monday, January 6, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Wilson
Council Member Buzzelli

STAFF PRESENT:

Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

STAFF ABSENT:

Bryan Chadwick, Town Administrator

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:31 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) Mayor Mulhollem requested to remove item 6 from the agenda as Town Administrator Bryan Chadwick was unable to attend the meeting due to sickness.

Moved by Council Member Wilson
Seconded by Council Member Jackson

Motion to Approve Agenda as Amended

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

a) None present.

4. DISCUSSION AND POSSIBLE ACTION ITEMS:

a) Discussion and Possible Action of Approving an Alternate for the Board of Adjustments (BOA)

Jason Kress explained to council that a member of Town Council must be

approved as an alternate for the Board of Adjustments (BOA) for the year 2025. Mayor Pro Tem Castleberry and Council Member Bruton volunteer to be the alternates.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Motion to Approve Mayor Pro Tem Castleberry and Council Member Bruton as Alternates for the Board of Adjustment (BOA)

CARRIED UNANIMOUSLY

b) Discussion and Possible Action of Appointing or Reappointing One Planning Board Member/Board of Adjustment Member

Jason Kress explained that a current member of the Board of Adjustments (BOA) no longer is able to participate as a member. He explained in order to move forward with finding a replacement the council would have to decide if they would like to appoint an individual who submitted an application the last time they were open or if they would like to open a new application for other individuals to apply. Council Member Bruton stated that she would like to hold another round of applications to see if there is any further interest from individuals who may not have applied in the last round. Attorney Burrell explained that there are no rules or statutory limits to what must be done to seek a replacement. Mayor Mulhollem agreed with the approach of seeking a new round of applications due to the turn out for the interest of the open Town Council position that was recently filled. Kim Batten expressed that she feels as if there is an individual ready and willing to participate as a member that has already expressed interest, she recommends to go with them instead of opening a new round of applications. Council Member Wilson agreed with Ms. Batten. Council Member Bruton explained that at the time of the meeting she would not be willing to vote to place someone into the seat on the BOA as she is not familiar with their application or their qualifications. Mayor Mulhollem explained that this is an issue that does not need to be voted on that night; however, he does come to a consensus based on the feelings of the council members that the position needs to be re-advertised.

c) Discussion and Possible Action of Approving the Town Clerk Job Description

Jenny Martin explained that the Town Clerk position has already been approved by the council in the budget for this year. The Town Clerk will become a position for one individual where as at the moment the responsibilities have been split between Ms. Martin and Joyce Lawhorn who is now retired. The goal for this position is to provide some type of relief for Ms. Martin in her position so that there is a dedicated person for the Town Clerk duties and minutes so that she can focus on and get up to date on the town's Human Resources needs.

Council Member Bruton and Council Member Buzzelli questioned the reasoning behind adding this position and why the structure needed to change. Kim Batten was able to provide clarification regarding the position of Town Clerk and the responsibilities of the position including the minutes. Council Member Buzzelli explained his perspective that having such a small staff that a having one person as dedicated Human Resources doesn't make sense to him. Ms. Martin explained that the number of individuals that are full time would not change. She also explained that the position itself of Town Clerk is not in question as it has already been voted on as it has already been approved. Ms. Martin explained that this discussion was to approve the job description for the position of Town Clerk.

Council Member Wilson expressed his interest in the description requiring the individual to be a certified town clerk where as they would already have the training needed to be successful in this position. Council Member Wilson also mentioned whether this was a NC Statute that a certification was a requirement. Discussion followed.

Council members requested to look into recording software and money to assist with the meeting minutes. Town Attorney Burrell expressed his opinion

on using artificial intelligence (AI) as means to getting caught up on the minutes and issues that may occur due to public records. Mayor Mulhollem explained that he and the council would like more information before they make a decision to approve the job descriptions.

d) Discussion and Possible Action of Approving the Human Resources Director Job Description

Discussion regarding Human Resources survey and the Council Member's ability to access the survey's results. Mayor Mulhollem explained that he and the Council would like more information before they make a decision to approve the job descriptions. This information included a request to look into towns that have positions separate versus together.

5. TOWN ATTORNEY'S REPORT:

- a) **Attorney Burrell wished everyone a Happy New Year. He also welcomed Council Member Bruton and Mayor Pro Tem Castleberry to the Board of Adjustments (BOA). He also stated for the record for future alternate members that it is very rare that the board has a meeting and as people continue to decide to join and new alternates are needed, as of now it is not a huge commitment to be a member of the Board of Adjustment.**
-

6. TOWN ADMINISTRATOR'S REPORT:

- a) **Removed from Agenda.**
-

7. HUMAN RESOURCES OFFICER/TOWN CLERK'S REPORT:

- a) **Ms. Jenny Martin shared with the Council Members that the part-time Executive Assistant position has been filled and that she employee started at the end of 2024. She expressed that she is thankful that the part-timer is present to take care some of Ms. Joyce Lawhorn's duties. She also shared that the upcoming Budget Retreat will take place on January 23rd at the Airport in Smithfield. Ms. Martin let them know that they should anticipate receiving more information soon regarding the meeting and it's start time. Mr. Buzzelli stated that due to a medical appointment for his wife he will not be present at the Budget Retreat.**
-

8. PARK AND RECREATION DIRECTOR'S REPORT:

- a) **Parks and Recreation Director Chris Allen greeted the Council Members and gave them an update on Baseball and Flag Football registration. Mr. Allen is working with Corinth Holders on the use of their facilities. He also explained that he has began to work on putting together the Summer 2025 programs. Mr. Allen is also adding on programs for the summer like popsicles in the park for children as well as art programs to enhance the town's programs during the summer. He is also bringing back the volleyball camp and softball camp and adding a soccer camp. Mr. Allen would like to add to fees and charges for teaching archery through the archery grant. He is looking forward to holding classes in the end of February and beginning of March. Mr. Allen is**

interested in holding adult classes due to the interest expressed by the community. As of right now the classes will be offered to the youth for ages 9-12.

Mr. Allen explained that there was funding mentioned at a meeting he attended regarding trails for the towns. He mentioned that he hopes to bring someone in to see if there is a way that Archer Lodge can benefit from that program.

9. TOWN PLANNER'S REPORT:

- a) **Jason Kress mentioned that he had very little to update on as it had been a pretty light month for zoning and planning. He explained that one of the topics that needed to be discussed was the executive committee for CAMPO. Council Member Bruton will continue as the primary member and Council Member Jackson will be the alternate. A vote will be held to approve this at the February meeting.**
-
-

10. MAYOR'S REPORT:

- a) **Mayor Mulhollem wished everyone a Happy New Year. He also reminded everyone regarding the Budget Meeting on January 23rd.**
-
-

11. COUNCIL MEMBERS' REMARKS:

a) **Council Member Wilson**

Council Member Wilson mentioned that the season of giving is not over as we should consider those in the western part of North Carolina struggling with the outstanding effects of the Hurricane as cold weather hits.

b) **Council Member Jackson**

Council Member Jackson echoed the giving season and the individuals in the western part of the state. He also wished the Mayor a Happy Birthday.

c) **Council Member Buzzelli**

Welcomed back Ms. Kim Batten. He also spoke regarding the 60 hams that the community center gave to helping hand.

d) **Mayor Pro Tem Castleberry**

Mayor Pro Tem Castleberry shared that there was good turn out at the Community Center last Wednesday where they had around 150 people in attendance. He also had the pleasure of meeting Trey Lewis who works for Senator Thom Tillis. Mayor Pro Tem Castleberry stated that Mr. Lewis is hoping to find more money for funding for additions to the Town like the park.

e) **Council Member Bruton**

Council Member Bruton wished everyone a Happy New Year and hoped that everyone has enjoyed their holidays. She apologized to Ms. Kim Batten for comments made earlier in the meeting and told Ms. Batten to let her know if something she says in the future comes off negatively as that was not her

intention.

12. ADJOURNMENT:

- a) Having no further business, Mayor Mulhollem called for a motion to adjourn.**

Moved by Council Member Wilson
Seconded by Council Member Jackson

Meeting adjourned at 8:05 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Budget Planning Retreat - Minutes
Wednesday, January 29, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Buzzelli
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Kim P. Batten, Asst. Town Administrator/Finance Officer
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the Budget Planning Retreat to order at 9:39 a.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. PLANNING DISCUSSIONS:

a) Bryan Chadwick, Town Administrator, began the meeting by encouraging all in attendance to use this meeting as an opportunity to look at what the goals are for the next year for the Town and how they can achieve those goals as a team.

b) Jenny Martin, Human Resources Officer/Town Clerk, initiated an ice-breaker activity so all Council Members and staff had an opportunity to get to know each other better.

c) Bryan Chadwick started by asking a series of questions to Council regarding their goals for the Town and took notes on presentation paper. Some ideas presented were that the Town provides: protection from being "taken over" by surrounding larger municipalities, preservation, quality of life and high standards for development. Mr. Chadwick reviewed different topics with the Council and put them in categories based on whether or not they were priorities for the following year.

- Some of the things that were discussed as priorities were continuing support of the fire department as well as Parks and Recreation department and the services provided. Another item discussed as a priority was managing traffic.
- Some items discussed as non-priorities
- Some items discussed as maybe priorities were police department.
- Discussion regarding questions that staff and Council have received regarding where the tax dollars from the community go other than Parks and Recreation and the services that were provided prior to incorporation (fire and police). Discussion followed regarding the current vision of the Town and trying to decide what managing the growth looks like for the Town going forward.
- Discussion regarding the largest thing that Archer Lodge does with tax dollars is the Planning and Zoning even though Parks and Recreation is the most visible. Mayor Mulhollem noted that there is a lot of changes that took place in the past 15 years. He reminded Council that post-incorporation development looks very different in comparison to developments done before incorporation and that in his opinion is thanks to the Planning and Zoning Department.
- Discussion regarding the fact that the Town is going to grow regardless and is growing every day. Mr. Chadwick shared that during the Town Council meetings it seems like the council is spinning wheels on the little things and there is not a lot being done. He encouraged the Council Members to decide what their goals are and be decisive in their decision making, not just for the Council but for the staff. Mr. Chadwick shared as an example something that decisions have to be made on in the future is the use of Johnston County Sheriff instead of Archer Lodge forming their own police department and handling animal control. There has to be some plan in order in case something were to happen to the way that things that they have now and being prepared for the expenses that are associated with those changes. Discussion regarding the need for reserves for emergencies and expansion.

3. LUNCH:

- a) Lunch was served and Council took a brief intermission.**
-

4. PLANNING DISCUSSIONS CONTINUED:

- a) Discussion regarding water and sewer, and what that would look like to have Archer Lodge's own water and sewer. Council members express that their understanding is that the public do not have an interest/support in having water and sewer due to the expenses associated and whether or not it is reasonable and a need for it. Discussion regarding what happened when Johnston County came in and began to offer water/sewer and what the process was originally. Mr. Chadwick explained that water and sewer basically dictate what (if anything) can be done. He posed a question to the Council, that if he were to receive 10 million dollars today that would get two thirds of the work done, would the council want to take it to do that? With the consideration that someone else would be paying for it for no impact on tax. The hypothetical idea would be that Clayton would be handling all billing and maintenance for the lines. Mr. Chadwick expressed that this hypothetical is just to determine if whether or not there is any interest in all in water/sewer to determine if energy and time should be spent investigating this. The consensus is that at this time Archer Lodge is not interested in collaborating with Clayton to bring water and sewer into Archer Lodge.**

- b) Discussion regarding goals, strategic planning, and big picture**
-

ideas. Ms. Kim Batten shared that all towns are to have a strategic plan so that there is something that the town can move towards. Council Member Jackson expressed that he thinks that there is goals such as maintaining the small town feel using different ordinances to put limits on lot sizes. Bryan Chadwick shared that having a strategic plan allows the Town to have goals and action items in order to better plan the budget and makes it much easier to complete the budget.

c) Discussion for desire to see picnic areas at the park with charcoal grills from Council Member Buzzelli. Mayor Mulhollem shared that there are potential areas in the conceptual plan for the area across the street that show drawings of small picnic areas for passive recreation as Council Member Buzzelli described.

d) Discussion regarding the attractiveness of the Town not just for those who live here but also to attract employees down the road. Questions were asked to determine what the Town offers the employees to attract the best candidates and prevent turn-over. Discussion followed regarding benefits provided to the employees of the Town. Concerns were expressed regarding the limitations in the budget and the additional costs associated with offering certain or more benefits to employees.

e) Discussion regarding the different way of reviewing the budget and the benefit of meeting individually to break down the budget as well as the preliminary numbers. Mr. Chadwick shared that the Town Council here in Archer Lodge receives more input and information than most other municipalities. Mr. Allen shared his experiences working in Rocky Mount and shared the benefits that the Council here in Archer Lodge has to be so involved with the creation to the budget. Ms. Kim Batten reminded council that there will be a presentation of the audit on the February 17th meeting.

f) Discussion regarding the following Budget Retreat and scheduling to ensure that all topics get to be discussed.

5. ADJOURNMENT:

With no further business Mayor Mulhollem adjourned the meeting at 4:29 p.m.

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Regular Council - Minutes
Monday, February 3, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Buzzelli
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director

COUNCIL ABSENT:

None

Page

MEDIA PRESENT:

None

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:30 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a)

Mayor Mulhollem recommended item 5F and 5G to be discussed at the Work Session Meeting.

After Item 6, add Town Administrator's Report.

After Item 10, add Closed Session for Personnel Discussion.

Moved by Council Member Wilson

Seconded by Council Member Castleberry

Motion to approve agenda as amended

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

a)

Pete Barnes would like to discuss the Parks and Recreation plan to do with what they've got. He said that the park "is nice and all that". He also questioned if the Clerk and HR Position is in the hiring stage. Mr. Bryan Chadwick confirmed that it is not for hiring at this point. He also questioned

part-time employees and their benefits. Mayor Mulhollem informed Mr. Barnes that the topic of part-time benefits will be discussed later on and that the State made the decision to offer the benefits to part-time employees by general statute and that the Town does not have a choice. Teresa Bruton confirmed that the state was allowing the part-time employee to contribute, not that the Town would be paying for it. Mayor Mulhollem explained that it is an opportunity but not an action.

b)

Sonia Wolk, resident at 457 Ferrett Lane, mentioned that she purchased her home in 2009 a few days before the town was incorporated. Her statements included that now with the current state of the government, it seems that "everything is getting stirred up". She stated she knows that the budget for the Human Resources position has been established but hiring has not. She asked Council to consider that the financial burden being placed on the taxpayers in Archer Lodge that there is a freeze placed on hiring and consider that federal employees are going to exit their jobs and there may be people that are competent to take this position. She encouraged staff to put on many hats to make things work here in Archer Lodge. She stated her opinion on Parks & Recreation and grants. She said that the money in her opinion is placing a burden on the people of Archer Lodge. She shared that she is a veteran but does not agree with spending for another Veteran Memorial. She shared that she is a practical person and that there is a need to think about what the Town is doing financially. She mentioned the minutes and what the priority should be for the Council and the Town government. Her opinion is that there was no need for the park here in Archer Lodge nor inclusivity in the Town park.

4. RECOGNITION/PRESENTATION:

a) Recognizing Terry Barnes for His Years of Service on the Planning Board

Mayor Mulhollem recognized Terry Barnes for his time served on the Planning Board from February 2015 through December 2024. Mayor Mulhollem presented him with a plaque. Mr. Barnes thanked the Council and the staff for the gesture.

5. DISCUSSION AND POSSIBLE ACTION ITEMS:

a) Discussion and Possible Action of Approving an Alternate for the Capital Area Metropolitan Planning Organization (CAMPO)

Mayor Mulhollem presented the possible action item. Council Member Bruton shared before a member is chosen that there was a survey taken at CAMPO and wanted to share that there is a potential change in the CAMPO meeting schedule that will be announced at the upcoming February meeting. Alternate chosen by council is Council Member Jackson.

Moved by Council Member Buzzelli
Seconded by Council Member Wilson

Motion to Approve Council Member Jackson as Alternate for CAMPO

CARRIED UNANIMOUSLY

b) Discussion and Possible Action of Appointing the Town of Archer Lodge Representative for the Johnston County Economic Development Advisory Board

Mayor Mulhollem presented the action item. Mayor Pro Tem Castleberry has served in this position for many years, Mayor Mulhollem asked if it was still in

his interest to continue as the representative. Mayor Pro Tem Castleberry confirmed he would like to continue as the representative. Mayor Mulhollem asked the Members of Council if there was any other person that would like to participate. There was no discussion.

Moved by Council Member Wilson
Seconded by Council Member Jackson

Motion to Appoint Mayor Pro Tem Castleberry as the Town of Archer Lodge Representative for the Johnston County Economic Development Advisory Board

CARRIED UNANIMOUSLY

6

c) Discussion and Possible Action of Adopting the Amended Fee Schedule

Chris Allen presented the amended fee schedule and shared that the only amendment is the addition of urban archery. Mr. Allen confirmed that based on the success of his current class that is ages 8-12 he is considering expanding to other age groups and adults. He reminded the Council that this Parks and Recreation addition is purely revenue for the Town as all equipment and training was through a grant to the department.

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Motion to Include the Fee for Urban Archery in the Fee Schedule

CARRIED UNANIMOUSLY

[AMENDED FEE SCHEDULE 2024-2025 02.03.25](#)

d) Discussion and Possible Action of Approving the Parks & Recreation Master Plan

Bryan Chadwick presented a few updates from 2015 to 2025 from Mindy. Due to technical difficulties, Mindy was not able to join the Council meeting via Zoom. He shared that he had met with Chris Allen to discuss the addendums and the addition that was added to the master plan. Mr. Chadwick explained that he would share this documentation directly with the Members of Council. He shared that some of the goals of the master plan created in 2015 have remained the same as these are goals that have yet to be achieved; however, in this plan they have built upon the goals from the 2015 master plan to match growth with the Town and surrounding areas. Data was presented from the most recent Recreation Survey. Mr. Chadwick discussed that there can be a special meeting to be held on February 17th to ensure that Mindy can be present as well as the accessibility grant. The master plan must be updated before applications can be made to grants. Discussion followed. Council Member Buzzelli and Council Member Bruton voiced some concerns to be discussed at the special meeting. No action taken at this meeting. It is decided to hold a special meeting on the 17th at 5:00 p.m. and for proper notice to be given.

e) Discussion and Possible Action of Approving the Updated Supplemental Retirement Benefits Policy

Bryan Chadwick explained that the change is for the ability for part-time to participate in the retirement benefits. Mayor Mulhollem explained that it is completely optional and that there is no contributions from the Town. Council Member Bruton shared that in her opinion there is a contradiction to the Town personnel manual and the separate policy. Mayor Mulhollem mentioned that Council Members and Planning Board do not apply in the personnel manual. Discussion followed. It is decided to discuss the changes for personnel policy for March meeting.

f) Discussion and Possible Action of Approving the Town Clerk Job Description

Removed from Agenda.

g) Discussion and Possible Action of Approving the Human Resources Director Job Description

Removed from Agenda.

6. TOWN ATTORNEY'S REPORT:

a) Attorney Burrell had nothing to report.

7. TOWN ADMINISTRATOR'S REPORT:

a)

Bryan Chadwick shared that there has been some headway made with the minutes as Ms. Joyce Lawhorn previously and now Heather Johnson has been working on the minutes. He mentioned that there is some fine tuning that needs to be done in the regards to transferring the files. However, we are very close to being through the end of the year. Mr. Chadwick also shared an update on the farm house. Originally the buyer had been given 90 days to move the house, but now it seems that it is just too far for them to move.

8. TOWN PLANNER'S REPORT:

a) Planning Update

Jason Kress shared the recommendation from the Planning Board for the possible zoning amendment changes. The Planning Board was in agreement that there should be no manufactured homes or accessory dwelling units allowed in subdivisions, only in agricultural residential areas. He also shared that they were in agreement for the accessory structure size amendment that was discussed. Mr. Kress informed Council that he would be updating the language in the ordinances for their vote hopefully at the March meeting.

b) Animal Control Update

Mr. Kress informed council that there were 9 total enforcement actions and the town was billed \$298.75 for those services.

9. PARK AND RECREATION DIRECTOR'S REPORT:

a)

Chris Allen informed Council that flag football, baseball, and tee-ball registration has been extended through February 10th. Numbers were up for flag football and down for baseball and tee-ball by approximately 100 participants. Flag football is a county-wide activity. Currently there are 5 flag football teams. Popsicles in the park will return this summer and there will be an art addition to the program. He will inform council when a start date has been decided. There will be a softball camp, volleyball camp, and then there will be an addition to include soccer camp and basketball camp. Volleyball camp and softball camp will be held at Archer Lodge Middle School. Soccer camp will be held at the field at town hall. Basketball camp will be held at Riverwood. Mr. Allen reminded that with spring sports registration

closing on the 10th, all members of the council will be invited to attend the opening day on Saturday March 15th at the park. There will be games, food trucks, and other activities. He also reminded the Council that Johnston County Open Spaces will be wanted to get on the calendar to connect Archer Lodge to the Greenway. There was 317 acres donated to Johnston County and that will open this summer.

10. MAYOR'S REPORT:

a) **Mayor Mulhollem had no report.**

11. COUNCIL MEMBERS' REMARKS:

a)

- Council Member Wilson: Reminded everyone that there will be 6 more weeks of winter.
- Council Member Jackson: Girl Scout Troop asked to lead the pledge of allegiance at a council meeting in the future and he will put them into contact with Mr. Chadwick. He also stated that he would be out of town for opening day.
- Council Member Buzzelli: Shared that he enjoyed the budget retreat and that it was a good meeting.
- Mayor Pro Tem Castleberry: No report.
- Council Member Bruton: No report.

Moved by Council Member Buzzelli
Seconded by Council Member Jackson
Motion to Move to Closed Session

CARRIED UNANIMOUSLY

12. ADJOURNMENT:

a) **With no further business, Mayor Mulhollem adjourned the meeting at 8:04 p.m.**

Moved by Council Member Jackson
Seconded by Council Member Buzzelli
Motion to Adjourn Meeting

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk

PARKS & RECREATION (continued)

PROGRAMS		
<u>Program</u>	<u>Residents</u>	<u>Non-Residents</u>
Adult Kickball (Team)	\$ 250.00	\$ 375.00
Softball Clinic	\$ 25.00	\$ 40.00
Basketball Camp	\$ 50.00	\$ 75.00
Football Camp	\$ 25.00	\$ 40.00
Volleyball Clinic	\$ 25.00	\$ 40.00
Corn Hole Tournament	\$ 50.00	\$ 75.00
Fall Youth Flag Football	\$ 50.00	\$ 75.00
Winter Basketball	\$ 50.00	\$ 75.00
Spring Baseball (JCLL) Tee ball	\$ 50.00	\$ 75.00
Spring Baseball (JCLL) 12U	\$ 70.00	\$ 105.00
Spring Baseball/Softball Senior 18U	\$ 90.00	\$ 135.00
Spring Softball (JCLL) 12U	\$ 70.00	\$ 105.00
Fall Baseball (JCLL) Tee ball	\$ 50.00	\$ 75.00
Fall Baseball (JCLL) 12U	\$ 70.00	\$ 105.00
Fall Baseball/Softball Senior 18U	\$ 90.00	\$ 135.00
Fall Softball (JCLL) 12U	\$ 70.00	\$ 105.00
Adult Softball (Team)	\$ 500.00	\$ 750.00
Winter Volleyball	\$ 50.00	\$ 75.00
Baby Sitting 101	\$ 100.00	\$ 150.00
Zumba	\$ 5.00	\$ 8.00
Yoga	\$ 5.00	\$ 8.00
Youth Cooking Class	\$ 40.00	\$ 60.00
Senior Chair Exercise	Free	Free
Senior Art Workshop	Free	Free
Adult Basketball (Team)	\$ 500.00	\$ 750.00
Summer Basketball	\$ 50.00	\$ 75.00
Introductory to Archery	\$ 40.00	\$ 60.00



**Special Meeting - Minutes
Monday, February 17, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson (LATE)
Council Member Buzzelli (LATE)
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Town Administrator/Finance Director
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 5:05 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Mayor Pro Tem Castleberry offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No Discussion.

Moved by Council Member Wilson
Seconded by Mayor Pro Tem Castleberry

Motion to Approve the Agenda as Presented

CARRIED UNANIMOUSLY

3. DISCUSSION AND POSSIBLE ACTION ITEMS:

5 - 232

a) Discussion and Possible Action of Approving the Parks & Recreation Master Plan

- Bryan Chadwick introduced Mindy Arthur from Susan Hatchell Landscape and Architecture to the Council and her goals to address questions and concerns in regards to the Parks and Recreation Master Plan.
- Ms. Arthur thanked staff and Members of Council for their thorough

review of the Master Plan.

- Ms. Arthur addressed concerns about the response levels of residents and non-residents for the survey that was executed. 2/3 of the respondents who are participating in Archer Lodge are residents and 1/3 of the respondents who are participating are non-residents. She said that this is great news as a higher number of residents responded this time than the last time. She clarified that it is rare for them to separate the residents versus non-residents as when applying for grants it is beneficial and typical to seek responses from the community as a whole. Council Member Bruton shared that in her opinion, Archer Lodge residents should be prioritized in the outcome of the study to ensure that their tax dollars are being used in ways that they approve of. Mr. Chadwick shared that the reasoning behind not sorting out non-residents is that the great majority of Parks and Recreation funding so far has come directly from state and federal grants, not from the taxes collected for Archer Lodge. Mr. Chadwick also confirmed with Ms. Arthur that sorting the data based on resident to non-resident would take a very long time. Ms. Kim Batten shared the process for how the survey was sent out through mass mailing for Archer Lodge residents. She also shared that there is no way to collect purely Archer Lodge residents unless a door to door survey was conducted. Mr. Chadwick shared that the purpose behind the survey was to prepare the updated Master Plan in order to be up to date in order to apply and qualify for grants. The Master Plans should be done every 10 years. Mayor Pro Tem Castleberry confirmed that if Archer Lodge were to apply for a grant without an updated Master Plan that it would count against the Town.
- Council Member Bruton shared her concerns with some things that were left over from the 2014 Master Plan that led to some contradictions. Mr. Chadwick confirmed that he reviewed the list of concerns with Ms. Arthur to make sure that there are not inconsistencies throughout the plan.
- Council Member Buzzelli shared his questions with Ms. Arthur. On Page 26, Council Member Buzzelli expressed that in his opinion we do not need a an adult baseball field due to the current population. Ms. Arthur shared that the way that the data is interpreted, there should be one field for up to 10,000 residents. He shared that he likes the idea of having a field but he believes that it is not necessary. Mr. Chadwick explained that the number is anything up to the population number not a minimum. Ms. Arthur confirmed that Mr. Chadwick was correct and is based on national averages. Council Member Buzzelli stated that he does not agree that we need an adult baseball field. Mr. Chris Allen explained that this adult field would be used for children aged 13 and up as they use the adult sized field and this field needed in order to program that age group. Mayor Mulhollem asked Ms. Arthur to clarify if Page 37 is identical to the chart that was on the last master plan. Ms. Arthur confirmed that the chart on Page 37 had been updated to reflect more recent national averages. Council Member Buzzelli shared his opinion that the verbiage should be changed to "up to" in the chart. Attorney Burrell explained that the purpose of this master plan is looking forward and projections regarding what national averages and standards are at the time the document was created. Attorney Burrell explained that this document is to gather information for decisions that the town uses to move forward and make decisions in the future by using the master plan as a road map.
- Changes to be made:
 - PDF page 37-29 chart - Change "/" to "for up to" on all columns
 - PDF page 8 - Change to ensure age consistence
 - PDF page 14 - Change store names (page 3, 6, 7)
- Mayor Mulhollem requested the council to present any issues and concerns that they have with the master plan that will impact the Town, Town Council, or future Town Councils over the next 10 years that the master plan is in place. None were mentioned.

Moved by Council Member Wilson

Seconded by Council Member Jackson

Motion to Approve the Parks and Recreation Master Plan as Presented to Include Changes on PDF Pages 37 to 29, PDF Page 8, and Document Pages 3, 6, 7.

CARRIED UNANIMOUSLY

[2025 AL Comprehensive Parks and Recreation Master Plan Update](#)

233

b) Discussion and Possible Action of Approving the Accessibility Grant Application

Bryan Chadwick explained the Accessibility Grant Application and that he has been working with Ms. Arthur to complete the application. He explained that what is needed from Council is permission to submit the application and to approve the match. Mr. Chadwick reminded Council that the match will be paid with the money that is currently held in reserves from the interest received from the original state grant from the park and that no additional monies will be needed to pay for the match. He explained that the decision for this grant has to be made tonight as the application is due March 3rd. Council Member Buzzelli asked to confirm that no additional tax dollars will be spent since the match will be paid for with the interest. Mr. Chadwick and Mr. Allen confirmed that it wouldn't as the match will be paid strictly with the interest funds that have been reserved. Council Member Wilson asked if the grant is from the state or the federal government. Mr. Chadwick confirmed that the accessibility grant is from the State of North Carolina. He also shared that this is the second round of the grant, as when the first round was held there was not enough projects submitted so with the remaining funds the state held a second round of grant applications. Mayor Mulhollem shared that upon meeting with Mr. Allen he confirmed that the grant would cover an additional playground for ages 9-12 as the current playground is for ages up to 8. Mayor Mulhollem explained that there will be features on the playground that make it accessible to children for disabilities but it will not entirely be strictly an accessible playground. Mr. Chadwick shared that it is important to use the grants that the town has the opportunity to apply for now as in the future it appears that there will be limited funding due to the natural disaster that occurs in the western part of the state. Mayor Mulhollem agreed that this is a great opportunity as it is rare to have a grant opportunity without having to spend additional funds. Council Member Wilson posed several questions regarding the accessibility of the playground and the park. Mr. Chadwick encouraged Council Member Wilson that the park will adhere to the ADA standards and features that would make the park inclusive to disabled children.

Moved by Council Member Jackson
Seconded by Mayor Pro Tem Castleberry

Motion to Approve the Accessibility Grant Application

CARRIED UNANIMOUSLY

[Project Cost Breakdown](#)

4. ADJOURNMENT:

a)

With no further business, Mayor Mulhollem adjourned the meeting at 6:27 p.m.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Motion to Adjourn

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk

Town of Archer Lodge

Comprehensive Parks and Recreation Master Plan Update

February 2025



Susan Hatchell
Landscape Architecture, PLLC



TABLE OF CONTENTS

Acknowledgements
Executive Summary

1 EXISTING CONDITIONS

Introduction
Population and Demographics
Socio-economic Trends
Town Government
Land Use and Zoning
2030 Comprehensive Land Use Plan
Town History
Cultural and Historical Resources
Community Health
Regional Transportation

2 NATURAL RESOURCES

Geography
Climate
Topography
Soils
Hydrology
Land Cover
Flora and Fauna

3 ANALYSIS OF EXISTING PARKS AND RECREATION FACILITIES

Existing Facilities and Programs
Special Events
Johnston County Parks and Open Space Program
Park Facilities and Programs Offered by Other Towns
Regional Connections

4 RECREATION STANDARDS AND COMMUNITY NEEDS ASSESSMENT

Introduction
National Recreation Trends and Projections
NRPA Needs Assessment
Recreational Demand in Johnston County
Public Input
Currently Underserved Areas

5 MASTER PLAN RECOMMENDATIONS

Introduction
Acquire Land
Develop Pedestrian and Bicycle Facilities
Develop a Nature Park/Preserve with Passive Recreation Opportunities
Develop an Active/Sports Park with Indoor Recreation Facility
Additional Recommendations
Action Steps
Summary

APPENDICES

Appendix A: Public Meeting Minutes
Appendix B: Parks and Recreation Survey Questions
Appendix C: Parks and Recreation Survey Results
Appendix D: Funding Opportunities and Creative Partnerships



ACKNOWLEDGEMENTS

Town of Archer Lodge

Mayor and Town Council

Matt Mulhollem, Town Mayor
Clyde Castleberry, Town Council Member/Mayor Pro-Tem
Teresa Bruton, Town Council Member
John Buzzelli, Town Council Member
J. Mark Jackson, Town Council Member
Mark Wilson, Town Council Member

Town Staff

Bryan Chadwick, MPA, ICMA-CM, Town Administrator
Kim Batten, CMC, NCCMC, Finance Officer/Assistant Town Administrator
Chris Allen, MS, CPRP, Parks & Recreation Director
Jenny Martin, PHR, SHRM-CP, Human Resources Officer/Town Clerk
Heather Johnson, Executive Assistant
Jason Kress, Town Planner

Design Consultant Team

Susan Hatchell Landscape Architecture, PLLC

Susan Hatchell, FASLA, PLA, LEED-AP, President
Mindy Arthur, ASLA, PLA, LEED-AP
Jennifer Steed



EXECUTIVE SUMMARY

Introduction

The Town of Archer Lodge was incorporated in 2009. Located in northern Johnston County, Archer Lodge offers small town charm and close proximity to the Research Triangle Park and major transportation corridors. These factors have led to rapid growth in and around the Town. Archer Lodge is to be commended for all it has accomplished in a short time. In its first 15 years, the Town secured funding, acquired land, and built its first park. In addition, the Parks and Recreation Department was established in 2022 with the hiring of its first director. Archer Lodge currently runs a variety of recreation programs at the Archer Lodge Town Park, the Archer Lodge Community Center, and the Archer Lodge Middle School.

Johnston County has an adult obesity rate of 41%¹ and is in the lowest quarter of North Carolina counties for heart disease and high cholesterol². Parks and recreation activities greatly benefit public health by assisting in the reduction of obesity rates as well as by helping to lower blood pressure and many other health concerns. Parks and recreation programs may also reduce feelings of isolation and depression and improve mental health outcomes. These positive effects on public health lead to both lower health care costs and healthy, stable communities.

Parks and recreation facilities also benefit communities in economic, environmental, and social ways. Parks increase property values, tax bases, and tax revenue. They may also increase business and tourism. Preserving land leads to improvements in air and water quality. They promote accessibility, improve public safety, and encourage intergenerational equity. Finally, parks encourage community participation, social interaction, and general wellness.

Existing Conditions

Archer Lodge has an older population compared to the State average and a higher percentage of households including children under the age of 18. Due to an older population and many families with children, the Town has a high demand for providing opportunities for exercise and recreation.

1 www.countyhealthrankings.org

2 2018 Johnston County Community Health Needs Assessment



Pictures from Archer Lodge Town Park

Comprehensive Parks and Recreation Master Plan Update



Goals and land use principles related to recreation opportunities for residents are addressed in the Town's 2030 Comprehensive Land Use Plan. The Town has an open space requirement for all large residential subdivisions. In lieu of providing open space, developers may pay a fee to the Town to be used solely for the acquisition of land for or development of parks and recreation facilities by the Town.

Natural Resources

The humid subtropical climate experienced by Archer Lodge is ideal for outdoor recreation. The Town is located in a fairly flat area with only slight variations in slope. The topography and general soil properties of the area are suitable for recreational development.



The Town is located between Buffalo Creek and the Neuse River. Streams and rivers make great corridors for greenways and offer potential regional connections for the Town.

Existing Recreational Facilities and Programs

Current recreational programs within the Town of Archer Lodge take place at the Archer Lodge Town Park, Archer Lodge Community Center, and the Archer Lodge Middle School. Open in 1963, the Community Center is operated by a non-profit entity.

Because recreation programs offered by the Town are relatively new and limited and because the demand is high, some residents still utilize the facilities and programs offered by towns nearby.

Recreation Standards and Community Needs Assessment

Recreation trends and projections from the National Survey on Recreation and the Environment (NSRE) are fairly consistent with the recreation needs and desires of Archer Lodge residents. According to area and facility standards set by the National Recreation and Park Association (NRPA), Archer Lodge does not meet the recreational demands of its population.

While auto-centric development patterns make it less safe to walk, bike, and play outdoors, residents need safe places to



Pictures from Archer Lodge Town Park

exercise and play. As the population in and around the Town of Archer Lodge continues to grow, available open space and land is rapidly diminishing. The need to acquire land for parks and recreation facilities and greenway corridors is more important now than ever.

Master Plan Recommendations

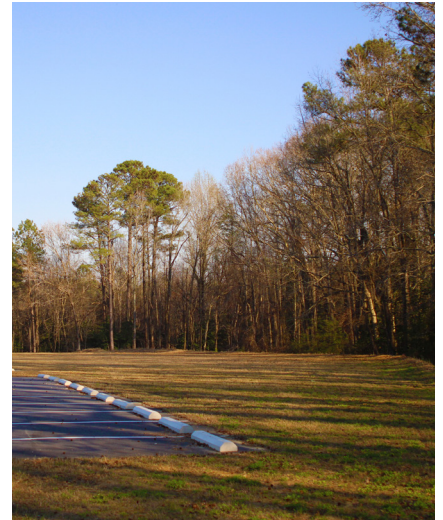
There is a great need for parks and recreation facilities in the Town. This need will continue to grow as the area becomes more developed and populated. It is recommended that the Town continue to seek funding from a variety of sources (outlined in Appendix D) to develop parks, greenways and other recreational facilities. Land acquisition for parks and greenway corridors is the top priority. The Town should also strive to promote walking and biking throughout the area through the implementation of greenways and other trails.

Archer Lodge should work towards developing greenways to promote walking and biking, a nature park/preserve with passive recreation opportunities, and an active/sport park with indoor recreation facility. The Parks and Recreation Department should work to increase staff members and to expand the programming and services offered. The Town should build public awareness of parks and recreation programs and seek public support.

It will take time and funding to acquire land and develop new parks and recreation facilities. The Town should seek partnerships with local schools, businesses, and other potential partners.

Action steps for moving forward:

- Establish potential partnerships
- Acquire park land with Town funds, grants, and other partnerships
- Develop parks, greenways, and other recreational facilities in phases to address demands and regional connectivity
- Expand the Parks and Recreation Department as well as the programming and services offered
- Continue marketing and communication to build public knowledge and support



Pictures from Archer Lodge Town Park



1 EXISTING CONDITIONS

Introduction

The Town of Archer Lodge is located in northern Johnston County. The Town’s 9.28 square miles make up 15% of the Wilders Township. Archer Lodge lies between the towns of Clayton and Wendell and is 20 miles from Raleigh. It is located within the Research Triangle Regional Partnership economic development region and is within forty miles of other major urban centers such as Cary, Durham, Goldsboro, and Wilson. See Figure 1.1 for a regional context map.

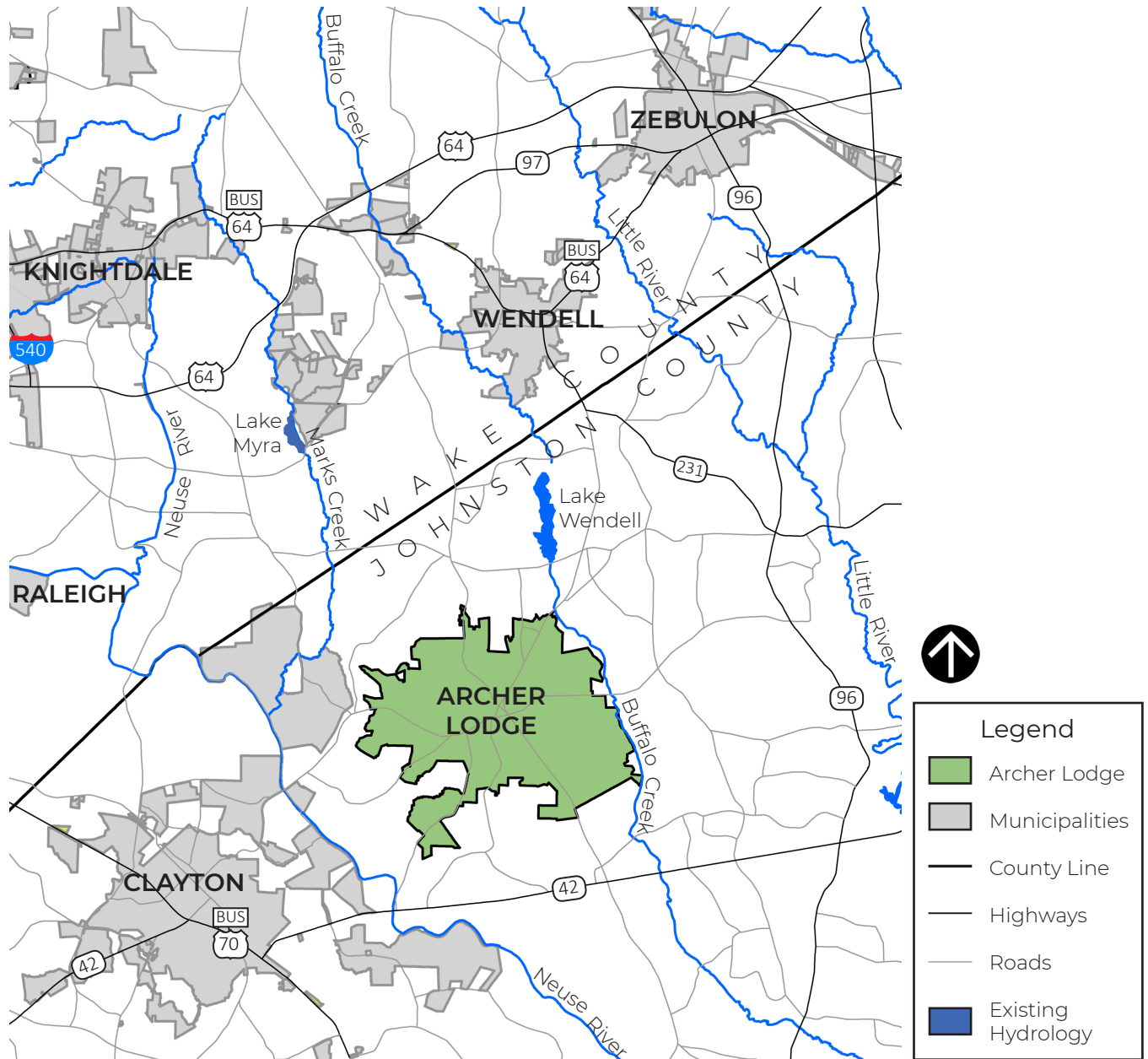


Figure 1.1: Regional Context Map - Not to Scale

Population and Demographics

With a current population of 5,365, Archer Lodge is the fourth largest municipality in Johnston County (2023 US Census estimate). The population of the area has increased by almost 12% over the past ten years. The population of Johnston County is projected to reach 337,223 by 2040 (North Carolina Office of State Budget and Management). If the population of Archer Lodge grows at a similar rate to the County, the 2040 population can be estimated at roughly 7,450. In addition, there are many subdivisions outside of the town limits that should be considered part of the Town's service area since these residents rely on the programs of nearby towns.

The distribution of males and females in Archer Lodge is about even (49.1% male, 50.9% female). The median age in the Town is 46.1 which is older than the state median age of 39.1. The largest percentage of the population within the town is split between 40 and 49 years old and 60 and 69 years old. Furthermore, 35% of households include children under the age of 18.

According to the American Heart Association, children need 60 minutes of active play every day, while adults need 30 minutes of moderate exercise five times a week. Due to both many families with children and a slightly older population, the Town has a high demand for exercise and recreational activities.

Socio-economic Trends

The Town of Archer Lodge has a lower percentage of residents with Bachelor's degrees than the rest of Johnston County and both state and national averages. The percentage of high school graduates is higher than state and national averages.

The median household income for the Town of Archer Lodge is \$73,750, compared to \$75,288 for Johnston County, \$70,804 for North Carolina, and \$80,610 for the United States. The Town's unemployment rate is 4.1%, compared to 3.1% in Johnston County, 3.7% in the state, and 4.1% for the nation.

Town Government

The Town of Archer Lodge is governed by an elected Mayor and Town Council. The Town Council is made up of five members, one of whom is elected as the Mayor Pro Tem.

Town employees include a Town Administrator, Assistant Town Administrator/Finance Officer, Human Resources Officer/Town Clerk, Executive Assistant, Town Planner, Parks and Recreation Director, and two Parks Maintenance Specialists.

Archer Lodge has a town website that can be accessed at www.archerlodgenc.gov. The Town has a social media presence on Facebook, Instagram, and X (formerly Twitter).

Land Use and Zoning

The Town of Archer Lodge is zoned primarily as Agricultural-Residential and Single Family Residential. The zoning map for the Town can be found in Figure 1.2. There are two isolated zoning areas designated for areas of manufactured homes (R-MHP) as well as zoning for Community Business (CB) and Neighborhood Business (NB).

Agricultural-Residential (AR) zoning encourages agricultural uses while ensuring residential development aligns with the land, public services, activity centers, and transportation systems. The minimum lot size is one acre and 15% of the site must be set aside as open space.

There are also three Single-Family Residential (SFR) districts. SFR-1 accommodates low density with a one-acre minimum lot area. SFR-2 allows for low to moderate density and 1.5 units per acre. SFR-3 accommodates a wide range of residential dwelling types and moderate density with 1.75 units per acre.

Residences within Archer Lodge are single-family detached homes and most are situated on a cul-de-sac subdivision street system. Single-family homes on larger lots can be found along the major rural roads.

Commercial developments include two large parcels which house the Archer Lodge Express and Boyettes' Loop Road Mini Storage as well as numerous smaller businesses scattered throughout the town. Land that has been developed for institutional and governmental uses (CB) as well as utilities includes the Community Center, churches, cemeteries, and government buildings. The Archer Lodge Middle School is located within an area zoned Office and Institutional (O&I).

Comprehensive Parks and Recreation Master Plan Update

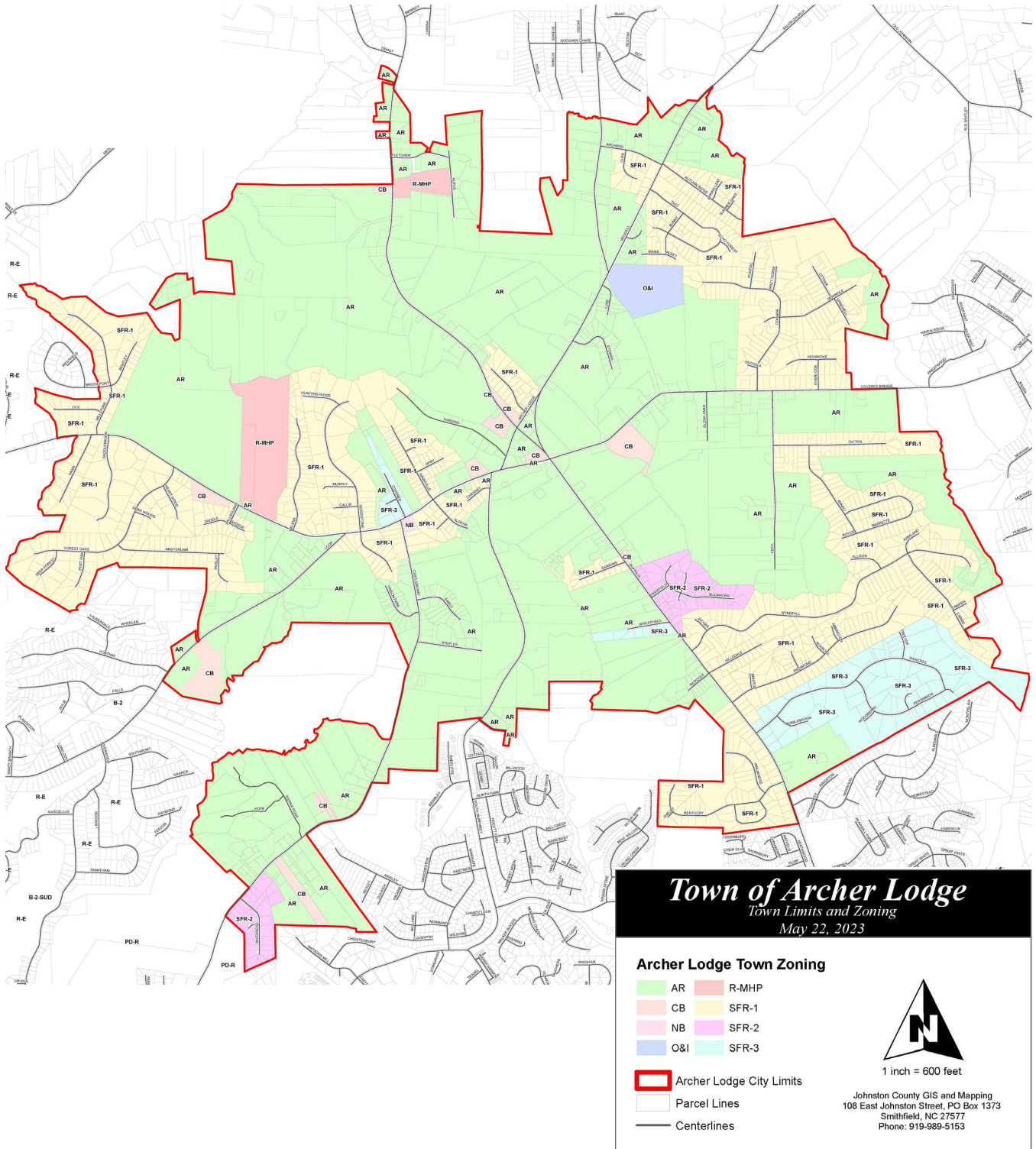


Figure 1.2: Town of Archer Lodge Zoning Map - Not to Scale

EXISTING CONDITIONS

4

2030 Comprehensive Land Use Plan

The Archer Lodge 2030 Comprehensive Land Use Plan was adopted March 9, 2015 and is currently in the process of being updated. The Vision Statement of the Plan is:

“Today and into the future the Town of Archer Lodge, will be a peaceful, family oriented, active community that looks to retain our small-town, agricultural character, meeting the needs of our current and future residents and businesses.”

The primary goal of the 2030 Comprehensive Land Use Plan is to encourage mixed-use development that is compatible with the small town character of Archer Lodge. The following land use principles are stated as a means of accomplishing this goal:

- Provide a high level of recreational facilities, services and programs
- Support a vibrant downtown with a village motif
- Enhance the workforce by creating and retaining jobs

The 2030 Comprehensive Land Use Plan makes several other recommendations to improve recreational opportunities in Archer Lodge. It outlines goals such as offering diverse and continually improving leisure and recreational opportunities for all citizens and recommends creating and allocating an annual budget to contribute to a Town recreational capital improvement fund. The Plan also encourages active and passive open space connectivity as well as a fee for developers of subdivisions in lieu of open space provision or dedication.

Open space requirements for all major subdivision residential developments can be found in the Town’s Unified Development Ordinance. Open space or recreation areas to suit residents’ common active or passive recreational uses are required within the development or the developer must pay a fee to the Town. The fee, established in the Town’s adopted fee schedule, is multiplied by the number of dwelling units in the subdivision. Any payment made in lieu of fulfilling open space requirements shall be used by the Town solely for the acquisition or development of open space, park sites, or other recreational facilities to serve residents of Archer Lodge. The Ordinance states that the open space or recreational area

Comprehensive Parks and Recreation Master Plan Update

shall be at least 15 percent of the total gross land area of the development.

Unless otherwise approved by the Town Planner, required open space within subdivisions will be contiguous and located as to border existing open space or adjacent developments whenever possible. The Ordinance also states that all open space must be accessible to pedestrians.

Any wetlands, riparian or stream buffer areas, or overhead utility easements located within major subdivisions must be designated as common open space, but these areas do not count towards the amount of required open space. This is beneficial to the Town, as these areas often make good locations for greenways. These requirements should assist in the establishment of greenway connections throughout Archer Lodge. As the Town develops, these connections can and should be expanded to reach regional recreational resources.

Town History

The Archer Lodge community has been in existence for over 150 years. In 1854, a Masonic Lodge called Archer No. 157 was established in what was then called Creachville. The Lodge was adjacent to the current location of the Archer Lodge Express at the Town's main intersection. Burned by Union troops during the Civil War, a duplicate charter for the Lodge was issued with the new designation of Archer Lodge No. 165. While the meeting place for the Lodge was moved to the Corinth-Holders community, the name remains the same.

Cultural and Historical Resources

Archer Lodge Middle School is the only school within the town limits. East Clayton Elementary, River Dell Elementary, Riverwood Elementary and Middle Schools, and Corinth-Holders Elementary and High Schools are located outside of the town limits but within the limits of Wilders Township.

Three churches exist within the town limits: White Oak Baptist Church, Clayton Community Church, and The Dwelling Place. There are many other churches within the Township including Clyde's Chapel Baptist Church, Salem Church, and Pineville Church. The building that currently houses the White Oak

Baptist Church was dedicated in 1959, one hundred years after the founding of the original church.

The Town is home to two country stores, David Pace's Grocery, which is in the original 1940's building that resembles an old-fashioned general store, and Archer Lodge Express, which was previously operated as the C.E. Barnes Grocery by the same family from 1927 until 2023.

Another long-stranding facility in the area is the Archer Lodge Community Center which hosts annual community events as well as Boy Scout and Cub Scout troops.

Community Health

Forty-five percent of adults are living with obesity in North Carolina¹. The state is ranked as the 8th lowest in the nation for obesity in high school aged children². Johnston County has an adult obesity rate of 41%³ and is in the worst quarter of North Carolina counties for heart disease and high cholesterol⁴.

According to the State of the County Health Report, the leading causes of death in Johnston County in 2022 were cancer and heart disease. The report places access to care, substance abuse, and transportation at the top of the Priority Health Issues list. The reoccurring health priorities identified in the Community Health Needs Assessment include access to healthy foods, adult obesity, and good parks and recreation facilities.

Parks and recreation activities greatly benefit public health by assisting in the reduction of obesity rates, strengthening hearts, helping to lower blood pressure, reducing risks for diseases, and leading to better mental health. Parks and recreation programs may also reduce feelings of isolation and depression and improve mental health outcomes. These positive effects on public health lead to both lower health care costs and healthy, stable communities.

1 obesitymap.norc.org

2 stateofchildhoodobesity.org

3 www.countyhealthrankings.org

4 2018 Johnston County Community Health Needs Assessment

Regional Transportation

Interstates I-95 and I-40 are easily accessible from NC Highway 42, which is just south of Archer Lodge. The Town is also in close proximity to US Highways 64 and 70. Residents can travel to the Raleigh area in thirty minutes via Highway 64 or Fayetteville in an hour and ten minutes via I-95. These routes are shown in

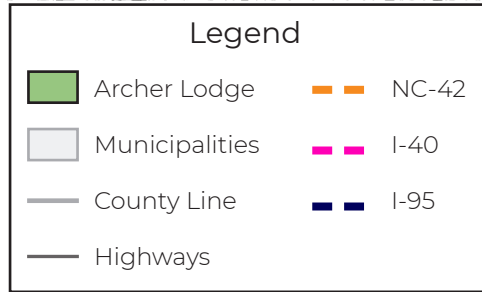
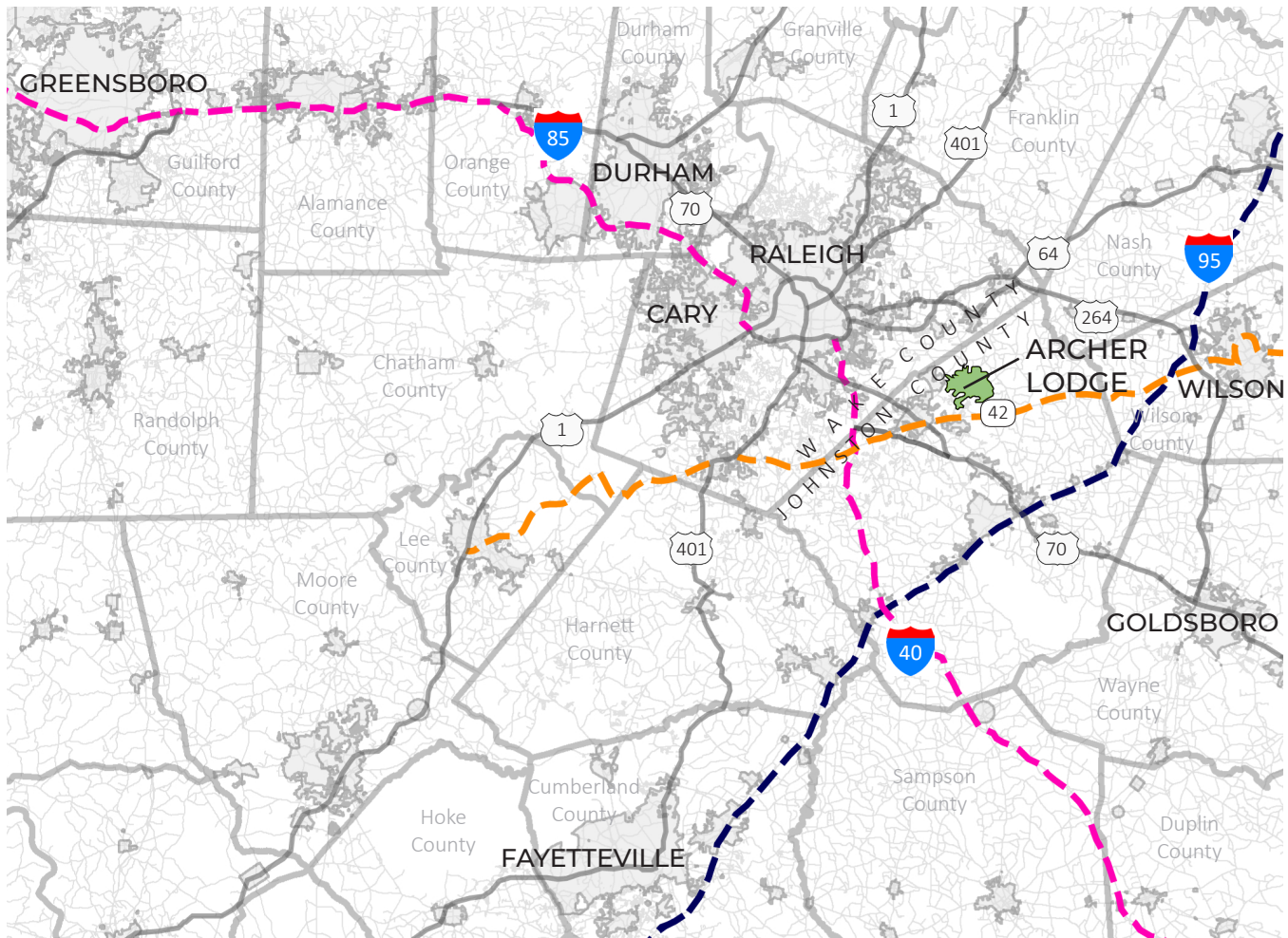


Figure 1.3: Regional Transportation Map - Not to Scale

2 NATURAL RESOURCES

Geography

Johnston County straddles the fall line between the Coastal Plain and the Piedmont Plateau of North Carolina. The northern portion of the county, which includes the Town of Archer Lodge, lies in the Piedmont which is characterized by gently rolling topography. At the fall line, the land transitions to the more gradually sloping, sandy soil typical of the Coastal Plain. See Figure 2.1, North Carolina Physiographic Map.

Climate

The humid subtropical climate of this region is ideal for outdoor recreational activities. The area is known for relatively high temperatures and evenly distributed precipitation throughout the year. Summers can be wetter due to frequent thunderstorms. Even during drier months, the area receives an average of more than three inches of rain per month. The annual average maximum temperature is 71.4 degrees Fahrenheit (F). The annual minimum temperature is 47.9 degrees F. The prevailing summer winds come from the south and southwest while prevailing winter winds come from the north and northeast. The average annual snowfall for the area is three inches.

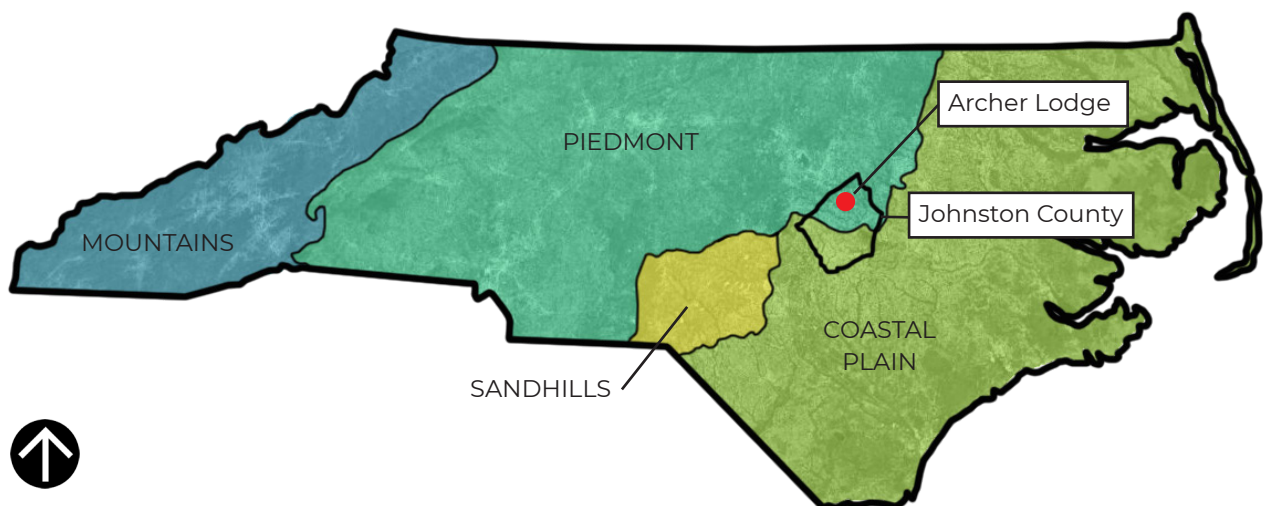


Figure 2.1 North Carolina Physiographic Map - Not to Scale



Field at Archer Lodge Town Park

Topography

As Johnston County is located partially in the Piedmont and partially in the Coastal Plain, elevations vary greatly from the southeast to the northwest. Topography for the area around Archer Lodge is shown in Figure 2.2. Elevations range from 31 feet along the Neuse River to 120 feet at the highest point. See Figure 2.3, Elevation Map. The Town is located in a fairly flat area with only slight variations in slope, making it ideal for recreational development.

Figure 2.4, Slope Analysis Map, identifies areas with steep slopes. Zero to six percent slopes are shown as shades of green. Generally, these areas were once used or are currently used for agriculture. These gentle slopes are most suitable for development. Moderate slopes of six to ten percent are shown as shades of yellow. Development in these areas may be limited due to potential soil erosion. Steep slopes, greater than ten percent, are shown in shades of red and generally occur along streams. Development in these areas should be avoided. The data for the slope analysis is based on Light Detection and Ranging (LIDAR). Site specific topographic surveys should be conducted prior to any design implementation.



Aerial view of Archer Lodge from Castleberry Road

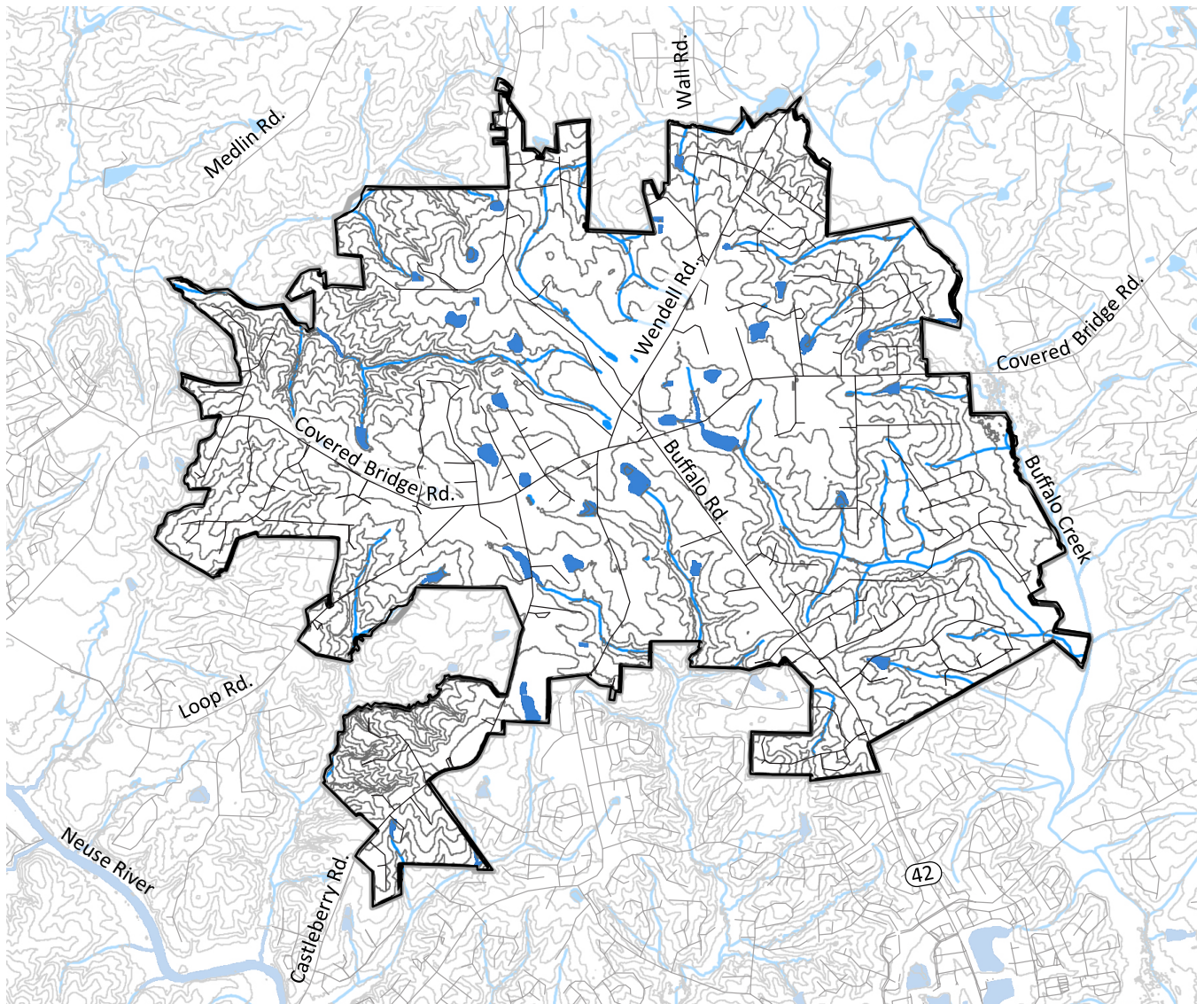


Figure 2.2: Topographic Map - Not to Scale

Comprehensive Parks and Recreation Master Plan Update

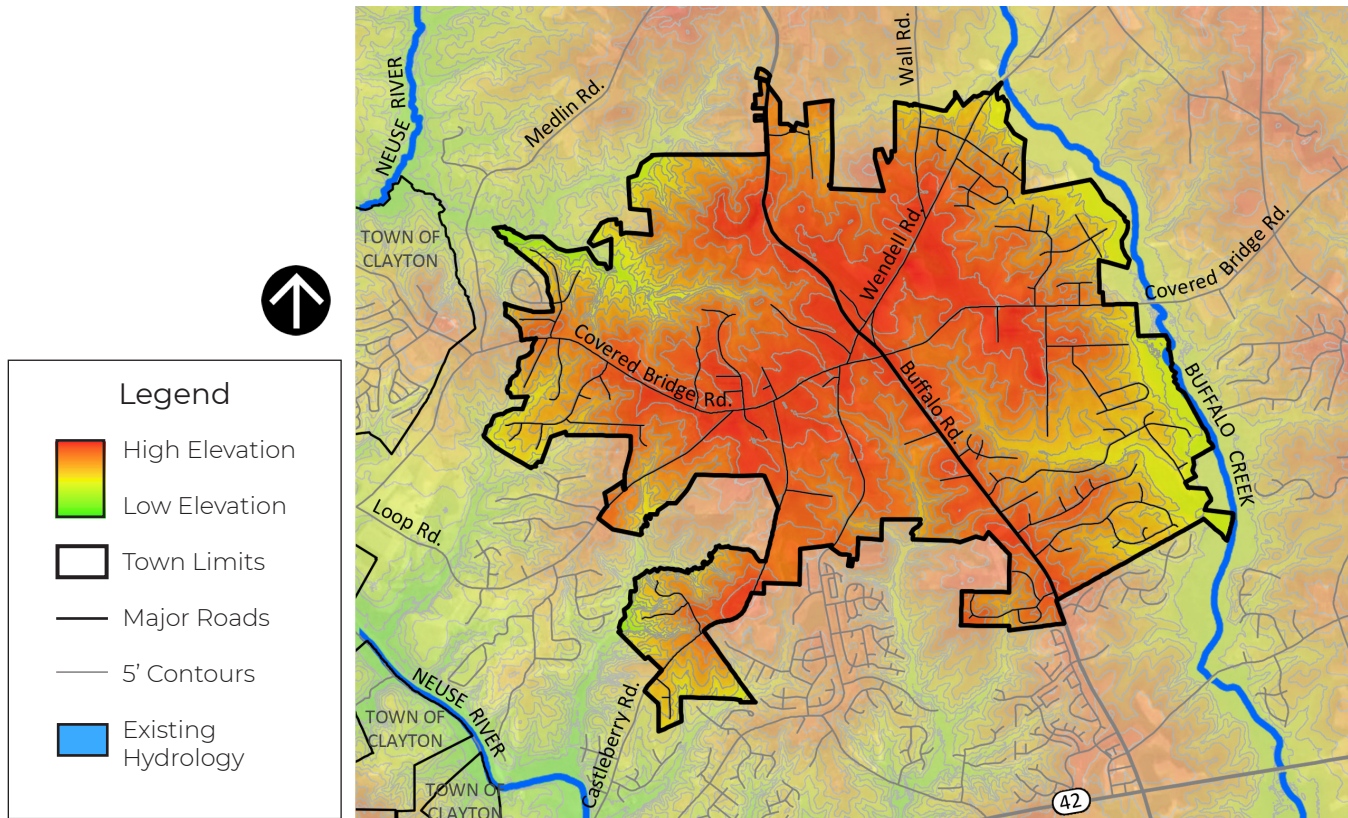


Figure 2.3 Elevation Map - Not to Scale

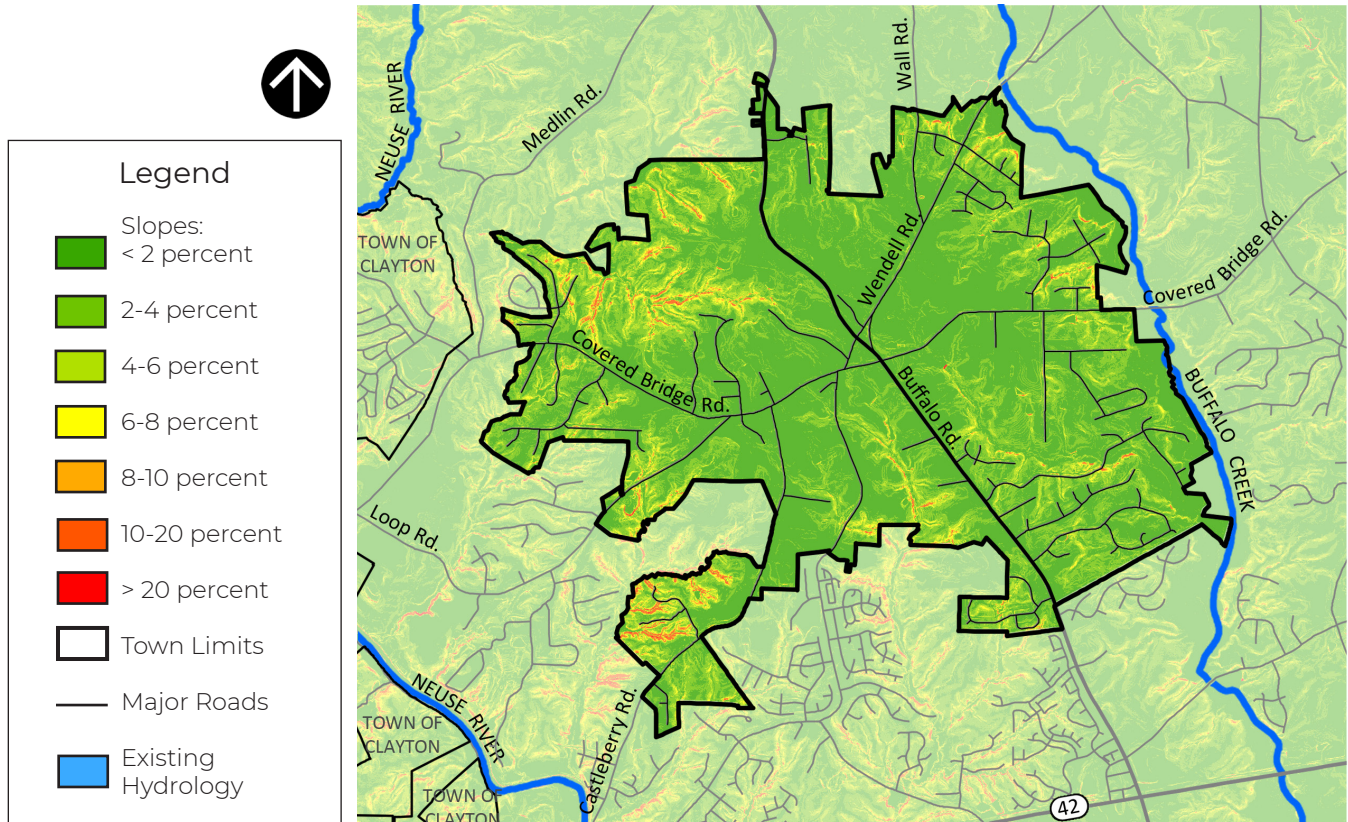


Figure 2.4 Slope Analysis Map - Not to Scale

Soils

The Soil Survey of Johnston County found 57 different soil classifications across the County. The primary soil types found within the Town of Archer Lodge are the Norfolk series, Cecil series, and Wedowee series.

The Cecil series (CeB) is a cecil loam soil found on slopes of two to six percent. It is also suitable for most urban and recreational uses. However, the clayey subsoil could affect some types of sanitary facilities and shallow excavations.

The Norfolk series (NoA) is a loamy sand soil typically found on zero to one percent slopes. It is suitable for most urban and recreational uses but may be limited by wetness in the lower part of the subsoil and its moderate permeability.

The Wedowee series (WoB) is a sandy loam typically found on slopes of two to eight percent. It is suitable for most urban and recreational uses although some urban uses may be limited by its moderate shrink-swell potential. Additionally, its moderate permeability may be a limitation for septic tank absorption fields.

All three soil types are suitable for recreation with few limitations that would affect use and management. The following chart shows how each is suited to different types of recreational development:

	Camp Areas	Picnic Areas	Play-grounds	Paths and Trails
Cecil Series (CeB)	slight	slight	moderate: slope	slight
Norfolk Series (NoA)	slight	slight	slight	slight
Wedowee Series (WoB)	slight	slight	moderate: slope	slight

Slight: Soil properties are generally favorable for the specified use. Any limitations are minor and are easy to overcome.

Moderate: Any limitations can be alleviated or overcome with proper design and planning or through special maintenance.

Hydrology

All but a small part of Johnston County is located in the Neuse River Basin. The Neuse River Basin is home to 3,880 miles of streams and rivers and 74 municipalities, including the Town of Archer Lodge.

Archer Lodge is located within subbasin number 6, which also includes the Town of Wendell and most of Zebulon. The subbasin is made up of the Little River and Buffalo Creek watersheds. The Town of Archer Lodge is part of the Buffalo Creek Watershed. A hydrological map is shown in Figure 2.5.

A small part of the southwestern portion of the Town is classified as a Water Supply Watershed (WS-IV NSW) area. A WS-IV Watershed is defined as “waters used as sources of water

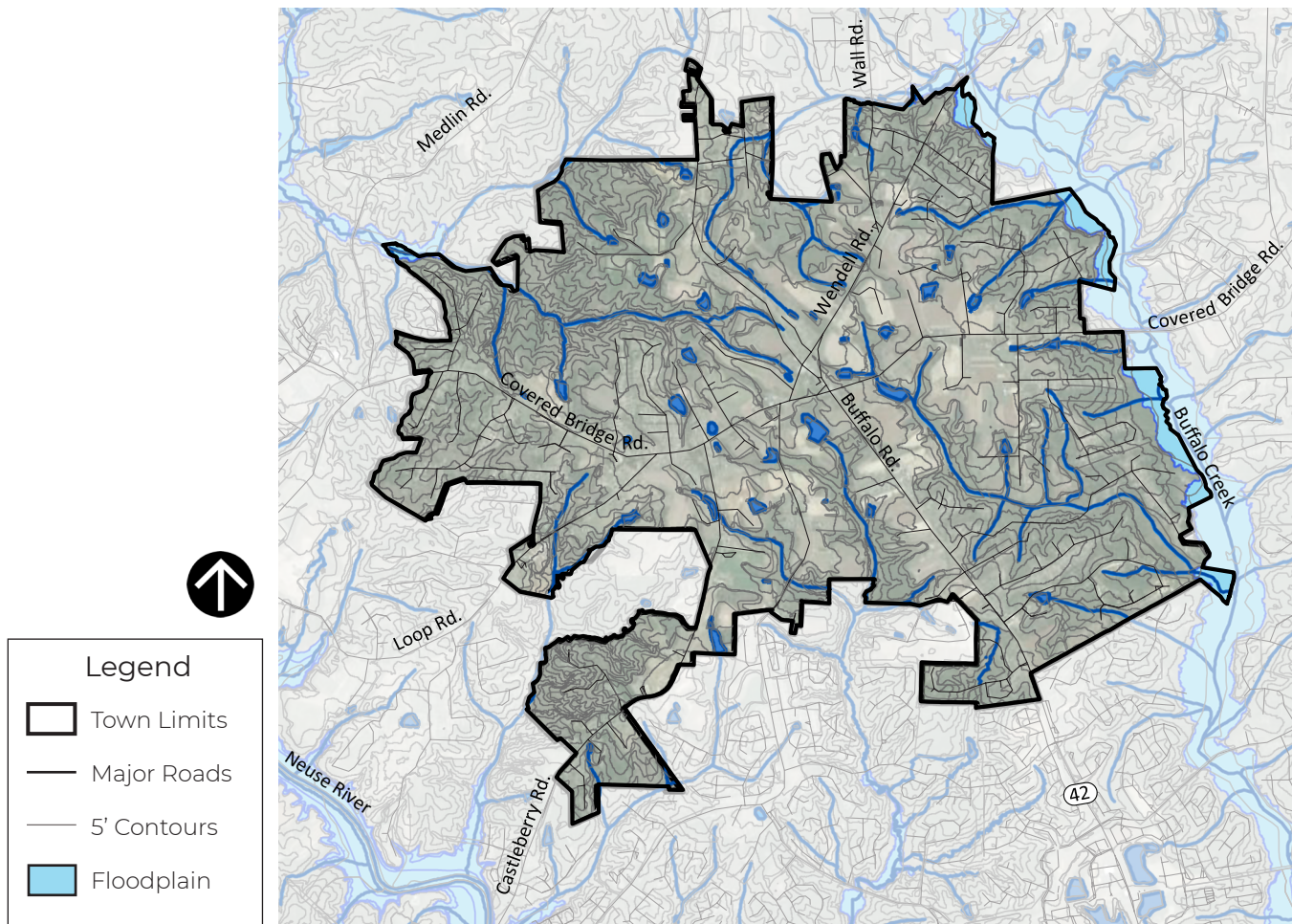


Figure 2.5 Hydrology Map - Not to Scale

supply for drinking, culinary, or food processing purposes for those users where a more protective WS-I or WS-II classification is not feasible.” The State requires municipalities to implement development controls within any watershed designated to serve as a public water supply.

Hydrology can be a limiting factor for active recreation development due to restrictions, required buffers and buffer regulation. However, streams and rivers can provide beautiful greenway routes and connections.

Land Cover

Fifty-nine percent of the land within the Town of Archer Lodge is used for agriculture or is forested. The remaining 41% is developed. The distribution of cleared land, forests, and water can be seen in Figure 2.6, Land Cover Map.

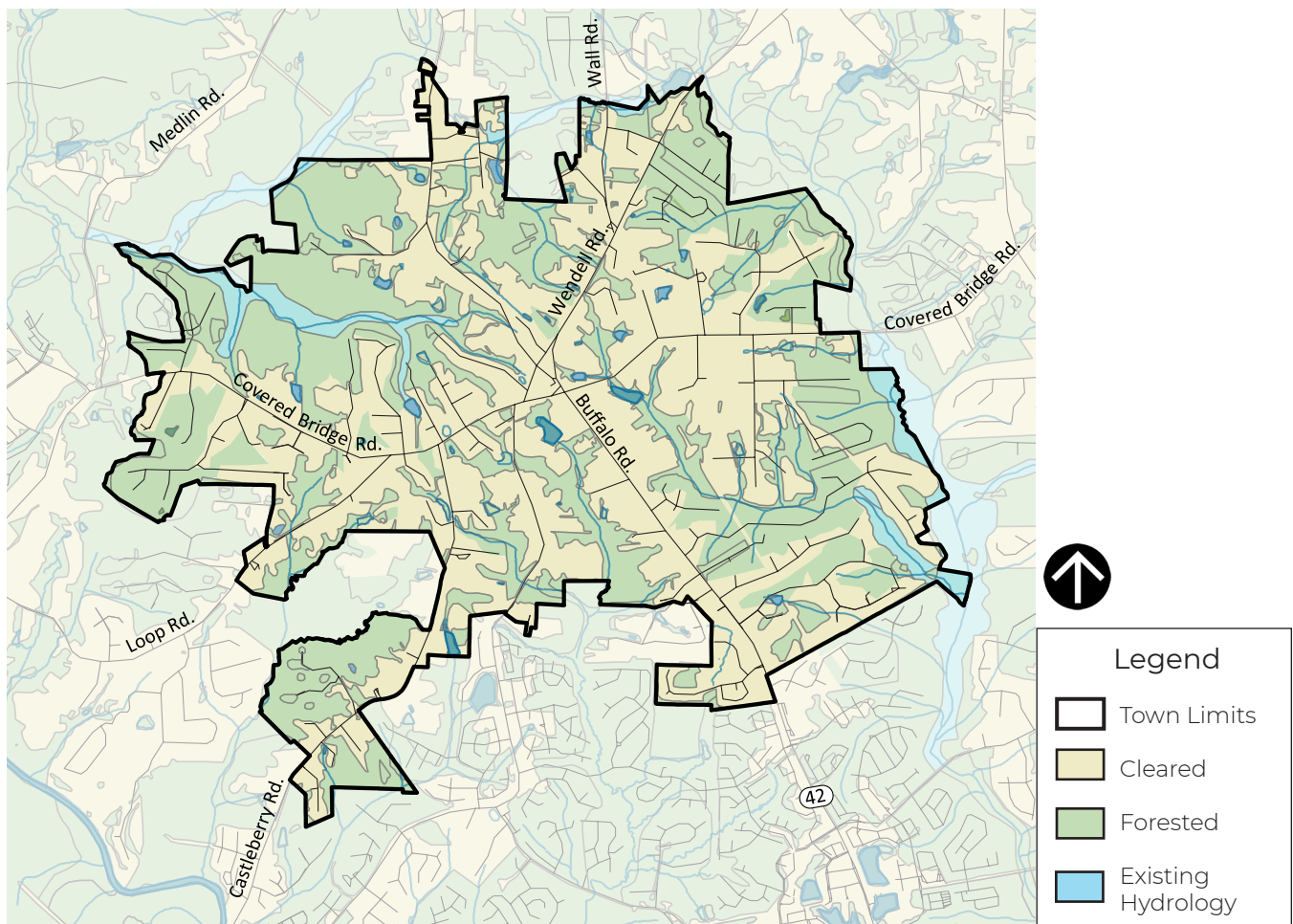


Figure 2.6 Land Cover Map - Not to Scale

Flora and Fauna

Dry coniferous woodlands including hardwood tree species such as oak, hickory, sweetgum, and red maple can be found in and around Archer Lodge. Early successional forests and pine stands can also be found around the many agricultural fields and pastures in the area. Floodplain forests include sycamore, river birch, and tulip poplar species. Various bird species, bats, squirrels, rabbits, snakes and raccoons can be found in the area. Larger mammals include foxes, coyotes, and white-tail deer.



3 ANALYSIS OF EXISTING PARKS & RECREATION FACILITIES

EXISTING FACILITIES AND PROGRAMS

The Town of Archer Lodge offers several recreation programs at its Town Park, the Archer Lodge Community Center, and the Archer Lodge Middle School. This is very exciting for a town that is only 15 years old!

Programs include:

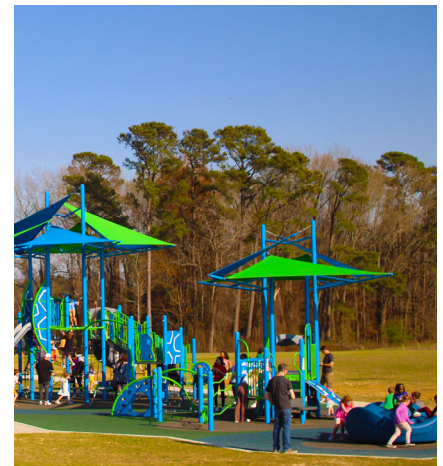
- Archery
- Flag Football
- Youth Basketball
- Youth Softball
- Youth Baseball
- T-ball
- Softball Clinics
- Volleyball Clinics
- Soccer Clinics
- Football Clinics
- Popsicles in the Park (reading event)
- Babysitting Course



Archer Lodge Town Park Sign



Ball Field at the Archer Lodge Town Park



Playground at the Archer Lodge Town Park

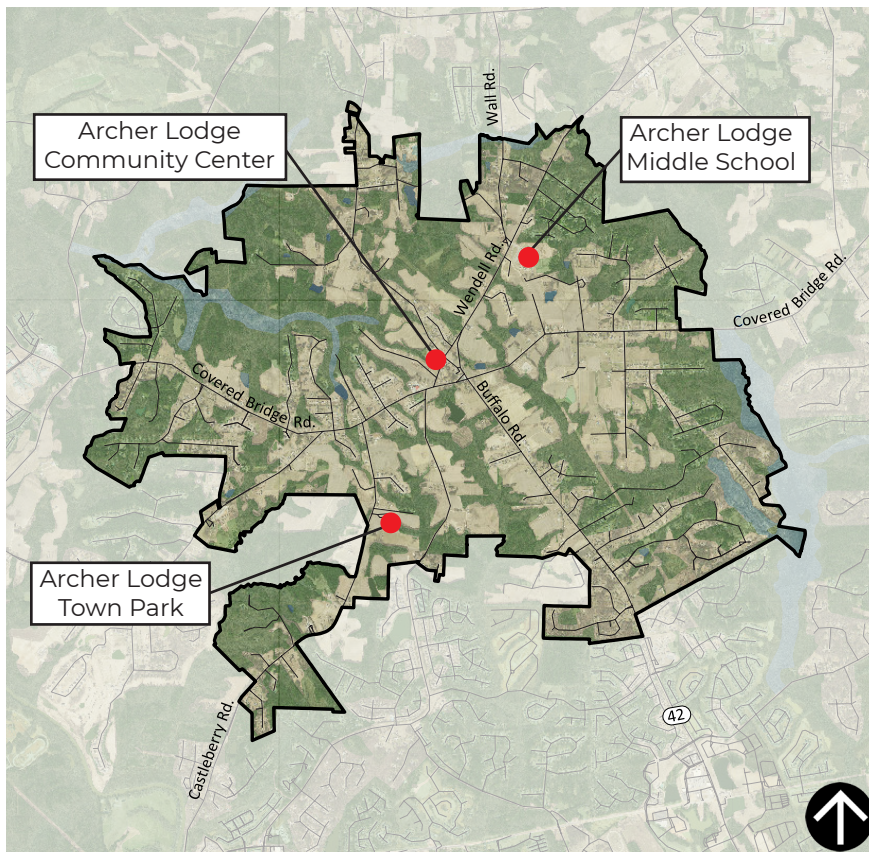


Figure 3.1 Map of Existing Parks and Recreation Facilities - Not to Scale

Comprehensive Parks and Recreation Master Plan Update



Archer Lodge Community Center Building



Ball Field at the Archer Lodge Community Center



Swings at the Archer Lodge Community Center

Archer Lodge Town Park opened in 2024 at 2636 Castleberry Road. The park has two ball fields, a playground, shelter with restrooms, multi-use fields, an open play area, and a half-mile walking path. Future phases of the park will include a second restroom building, three pickleball courts, an inclusive playground, and a shelter/stage adjacent to the open play area.

On the parcel across Castleberry Road from the Town Park, the Town plans to construct a park office with meeting rooms, a maintenance facility and yard, a walking path, three picnic shelters, and an outdoor fitness equipment area.

The Town of Archer Lodge's first Parks and Recreation Director was hired in December 2022. Currently, the department operates out of Town Hall and will relocate to the park office at Archer Lodge Town Park once it is constructed. There are three full-time employees with two Maintenance Specialists in addition to the Director.

Located at 14009 Buffalo Road, Archer Lodge Community Center, Inc. has an amphitheater, ball field, basketball court, picnic shelter, playground, tennis court, soccer field, and a third of a mile walking trail. Additionally, the Community Center building may be rented for parties, reunions and other events. Programs offered by the Community Center include recreation and competitive soccer programs and Little League baseball and softball for ages 4-16.

There are additional recreational facilities available at select schools and churches in and around the Town. Located within the Town limits, the Archer Lodge Middle School offers two baseball/softball fields and a soccer field.

Special Events

The largest special event is the annual Archer Lodge Family Fun Day on July 4th organized by the Community Center. There is a parade as well as food, music, and games. The day ends with a fireworks display.

The Community Center also hosts an annual Christmas Parade. Following the parade is a celebration including train rides, pictures with Santa, a tree lighting ceremony, music, and children's activities.

Johnston County Parks and Open Space Program

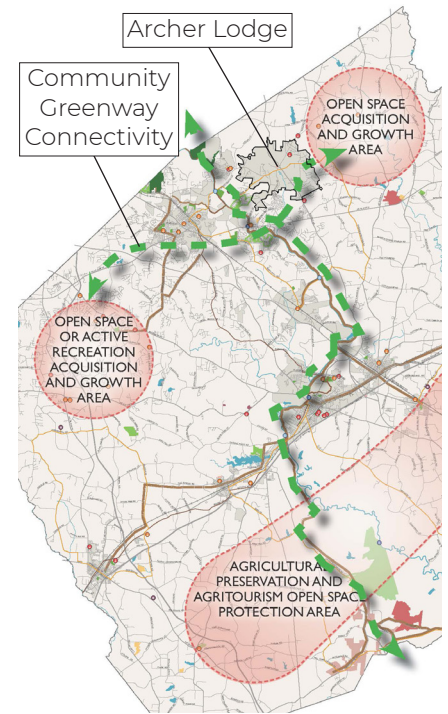
The Johnston County Parks and Open Space Program was established in 2019. Per its mission statement, it is “committed to the active preservation of open space that protects and maintains the natural and cultural landscape for the overall enrichment of the community.” The program’s goals are:

- To conserve and restore natural, cultural, and agricultural resources for the benefit of the environment and the public.
- To provide public outreach, partnerships, and volunteer opportunities to increase awareness and appreciation of Johnston County’s open space.
- To foster the balance of natural resources, wildlife, recreation, and economic development in Johnston County.
- To create, enhance & sustain public parks, trails, and open space for recreational/educational activities throughout Johnston County.

The 2021 Johnston County Parks and Recreation Master Plan Update recognized the area east of Archer Lodge as an Open Space Acquisition and Growth Area. It also indicated community greenway connectivity on the south-western and south-eastern sides of the Town.

In May 2023, the Johnston County Regional Park Master Plan was adopted. The park will be located on the former Cleveland Road School grounds which is about 15 miles south-west of Archer Lodge. A design-build team was selected and preliminary engineering/pre-construction work for Phase 1 of the park began in December 2024.

Other ongoing projects in the department include a County-Wide Comprehensive Trails and Greenway Master Plan, Smithfield to Benson East Coast Greenway Feasibility Study, Wilson’s Mill Greenway Project, and Neuse River Trail Clayton-Smithfield Connection Feasibility Study.



Recreational Resources Map from the Johnston County Parks and Recreation Master Plan Update, April 2021 - Not to Scale

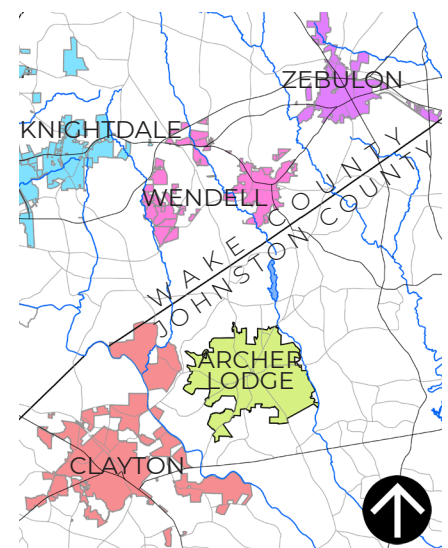


Figure 3.2 Town Comparison Context Map

Comprehensive Parks and Recreation Master Plan Update

Park Facilities and Programs Offered by Other Towns

Archer Lodge is in close proximity to many other small towns. Figure 3.2, Town Comparison Context Map, shows the location of four towns in relation to Archer Lodge. A comparison has been made to the park facilities and programs offered in Wendell, Clayton, Knightdale, and Zebulon to what Archer Lodge offers. See Figure 3.3, Recreational Facilities Comparison.

	Clayton	Knightdale	Wendell	Zebulon	Archer Lodge
Incorporated	1869	1927	1903	1907	2009
Population	30,216	20,275	14,400	9,401	5,365
Area	15.24 square miles	7.95 square miles	5.76 square miles	5.25 square miles	9.07 square miles
Parks & Rec. Department?	Yes	Yes	Yes	Yes	Yes
Parks & Rec. Master Plan?	Yes (Being updated)	Yes (2022)	Yes (2019)	Yes (2021)	Yes (Updated 2025)
Parks & Recreation Facilities	<ul style="list-style-type: none"> • Clayton Community Center • Clayton Community Park • Donald "Clyde" Sinclair Park • East Clayton Community Park • East Clayton Disc Golf Course • East Clayton Dog Park • Harmony Playground • Municipal Park 	<ul style="list-style-type: none"> • Harper Park • Knightdale Community Park • Environmental Park • Knightdale Station Park • Mingo Creek Park • Panther Rock Park • Knightdale Community Pool 	<ul style="list-style-type: none"> • Wendell Park and Community Center • J. Ashley Wall Town Square • Lake Myra School Fields 	<ul style="list-style-type: none"> • Zebulon Community Park • Zebulon Elementary School Park • Wakelon Elementary School Park • Gill Street Park • Whitley Park • Little River Park • Zebulon Community Center 	<ul style="list-style-type: none"> • Archer Lodge Town Park • Archer Lodge Community Center (operated by a non-profit entity, not the Town) • Archer Lodge Middle School
Adult Athletic Programs	<ul style="list-style-type: none"> • Basketball leagues 	none	<ul style="list-style-type: none"> • Tennis • Women's Fast Pitch Softball • Church Softball • Volleyball • Men's Basketball • Men's Softball • Pickleball 	<ul style="list-style-type: none"> • Pickleball • Tennis • Basketball 	<ul style="list-style-type: none"> • Coed Kickball

Figure 3.3 Recreational Facilities Comparison

Comprehensive Parks and Recreation Master Plan Update

	Clayton	Knightdale	Wendell	Zebulon	Archer Lodge
Youth Athletic Programs	<ul style="list-style-type: none"> • Baseball (ages 7-15) • Softball (7-15) • T-Ball (5-6) • Coed Soccer (4-7) • Girls Volleyball (7-16) • Basketball (7-18) 	<ul style="list-style-type: none"> • Baseball (4-15) • Softball (9-12) • Basketball (5-16) • Volleyball Academy (7-14) • Tennis Academy (7-Adult) • Soccer (2-high school) 	<ul style="list-style-type: none"> • T-Ball (ages 3-4) • Coach Pitch (5-6) • Baseball (7-15) • Softball (7-12) • Girls Beach Volleyball (9-16) • Girls Volleyball (9-14) • Basketball (3-17) • Soccer (3-11) 	<ul style="list-style-type: none"> • T-Ball (ages 4-6) • Baseball (7-15) • Softball (7-15) • Soccer (5-12) 	<ul style="list-style-type: none"> • T-Ball (4-6.5) • Baseball (7-12.5) • Softball (7-12.5) • Basketball • Flag Football (7-16) • Archery
Other Parks & Recreation Programs	<ul style="list-style-type: none"> • After school programs and camps • Art classes • Youth fitness and dance classes • Senior programs • Specialty classes and workshops 	<ul style="list-style-type: none"> • Summer and track out camps • Art classes • Fitness programs • Adult fitness classes and clinics 	<ul style="list-style-type: none"> • Summer and track out camps • Sports clinics • Senior programs • Community garden • Bird walks 	<ul style="list-style-type: none"> • Summer camps • School's Out activities • Youth fitness and gymnastics programs • Adult fitness classes • Senior programs 	<ul style="list-style-type: none"> • Sports clinics • Babysitting course • Reading event
Greenways and Trails	<ul style="list-style-type: none"> • Sam's Branch Greenway (1.25 miles) • Clayton River Walk on the Neuse (4.0 miles) • Clayton Community Center (indoor walking track) • Clayton Community Park (0.5 mile paved and 0.3 mile unpaved trails) • East Clayton Community Park (1.0 mile paved and gravel trail) 	<ul style="list-style-type: none"> • Harper Park Trails (n/a) • Knightdale Community Park Trails (n/a) • Knightdale Environmental Park Trails (n/a) • Knightdale Station Park Trails (n/a) • Mingo Creek Trail (3.5 miles) 	<ul style="list-style-type: none"> • Hugh T. Moody Nature Trails (2.1 miles) 	<ul style="list-style-type: none"> • Beaverdam Creek Greenway (just under 1.0 mile) • Little River Park (unpaved trail) • Zebulon Community Park Walking Trails (n/a) • Zebulon Elementary School Park Walking Path (n/a) 	<ul style="list-style-type: none"> • Archer Lodge Town Park Walking Path (0.5 mile)
Regional Connections	<ul style="list-style-type: none"> • North Carolina Mountains-to-Sea Trail • East Coast Greenway 	<ul style="list-style-type: none"> • Neuse River Greenway Trail 	<ul style="list-style-type: none"> • Buffalo Creek Greenway (in planning phase) 	<p>none</p>	<p>none</p>

Figure 3.3 Recreational Facilities Comparison

Comprehensive Parks and Recreation Master Plan Update

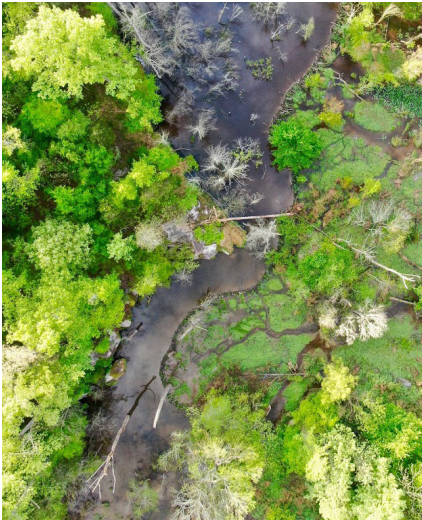


Regional Connections

The 2020 Archer Lodge Bike and Pedestrian plan highlights several pedestrian and bike enhancement projects. The top three priority projects included improvements to the covered Bridge Road Corridor, the Buffalo Road corridor, and the implementation of a greenway along the existing Duke Energy easement. Future greenways and trails will add other opportunities for off-road pedestrian and bike connectivity.

In addition, there are many recreational resources nearby that could serve the residents of Archer Lodge if connected via greenways or other trails. Regional trails include the Neuse River Trail, the North Carolina Mountains-to-Sea Trail, and Wake County greenways. Other recreational resources include:

- East Clayton Community Park
- Clayton River Walk
- Municipal Park (Clayton)
- Wendell Town Park
- Knightdale Station Park
- Wake County Parks and Open Space (Turnipseed Nature Preserve and Future Lake Myra County Park)
- Clemmons Educational State Forest
- Future Buffalo Creek Greenway in Wendell



These potential regional connections as well as existing and proposed recreation facilities in and around the Town of Archer Lodge are shown in Figure 3.4, Regional Connectivity Map.



Comprehensive Parks and Recreation Master Plan Update

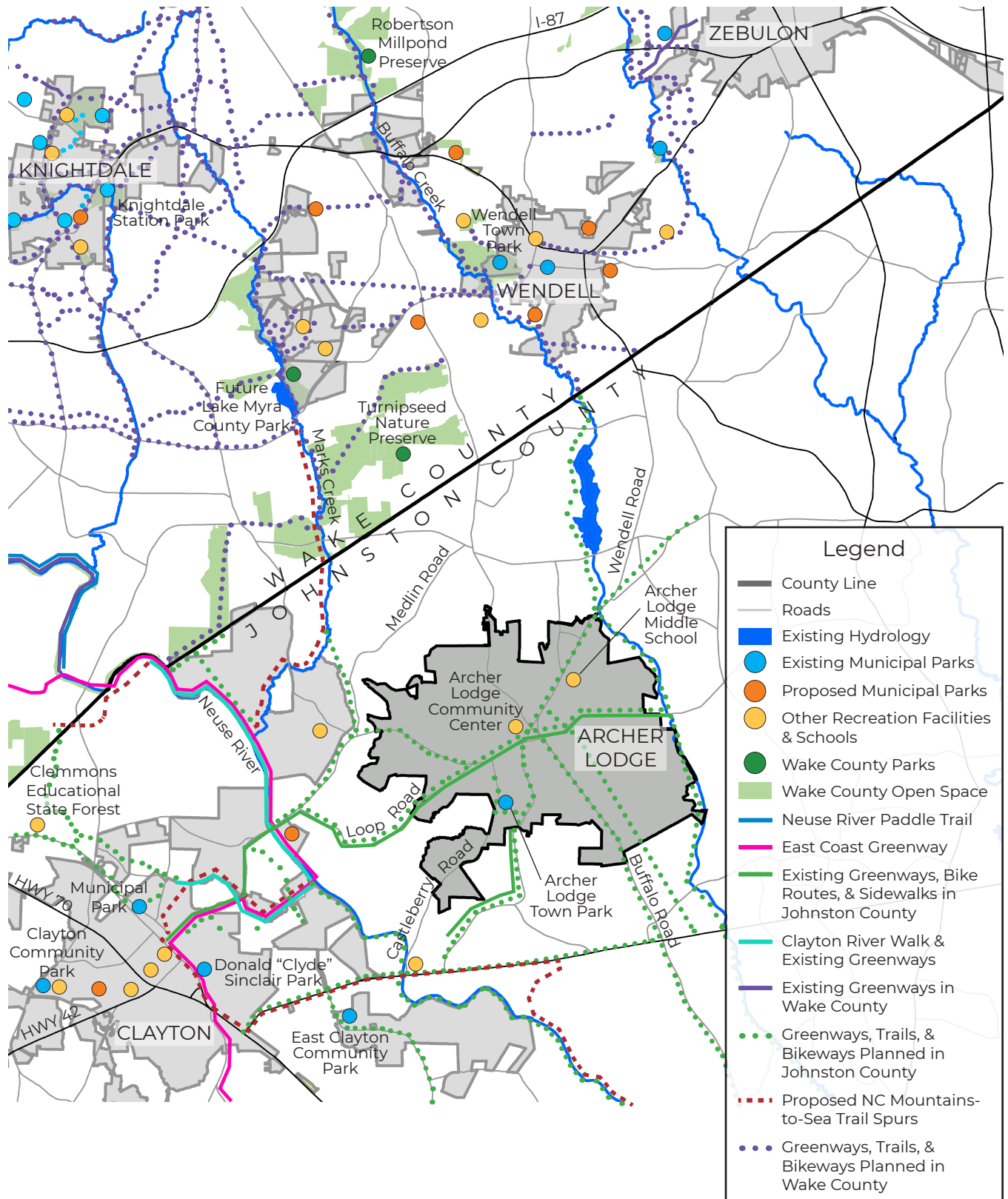


Figure 3.4: Regional Connectivity Map - Not to Scale



4 RECREATION STANDARDS AND COMMUNITY NEEDS ASSESSMENT

INTRODUCTION

Several methods were used to determine the recreational needs of the Archer Lodge community. National recreation standards and recreation trends as well as methods specific to the Town such as a Parks and Recreation Survey and public meeting were utilized.

NATIONAL RECREATION TRENDS AND PROJECTIONS

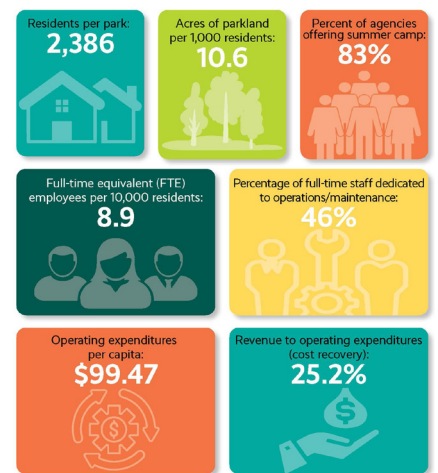
The National Survey on Recreation and the Environment (NSRE), originally the National Recreation Survey (NRS), was created in 1960 by the Outdoor Recreation Resources Review Commission (ORRRC). The NSRE was an in-the-home survey of participation in outdoor recreation in the United States.

According to the NSRE performed between 2002 and 2007, the most popular outdoor recreation activities were:

1. Walking for pleasure (82%)
2. Family gathering (74.6%)
3. Gardening or landscaping (65.4%)
4. Driving for pleasure (58.2%)
5. View/photo natural scenery (57%)
6. Visit nature centers (52.9%)
7. Sightseeing (52.9%)
8. Picnicking (50%)
9. Attend sports event (48.6%)
10. Visit a beach (44.2%)
11. Visit historic sites (43.1%)
12. View/photo wildlife (43%)

NRPA NEEDS ASSESSMENT

The National Recreation and Park Association (NRPA) prepared its 2024 NRPA Agency Performance Review based on data gathered from park and recreation agencies across the country over the past year. This document provides a reference for parks and recreation agencies to compare their performance metrics to the national averages and to determine areas for potential expansion or improvement.



Key Findings Infographic from the 2024 NRPA Agency Performance Review

Comprehensive Parks and Recreation Master Plan Update

According to the NRPA, the typical park and recreation department has one park for every 2,386 residents. The most commonly accepted standard for park acreage is 10.6 acres of parkland per 1,000 residents. Based on the 2023 US Census estimate of 5,365 residents, Archer Lodge needs about 57 acres of parkland to support its residents. Archer Lodge Town Park is 31.5 acres. To meet the standards, the Town needs to add about 26 acres of parkland. Departments serving populations of less than 20,000 people typically manage 4.5 miles of trails. More than half of the departments have recreation centers and/or community centers with swimming pools as the most common indoor facility provided. Eighty-three percent of departments offer summer camps, and 52% have community gardens.

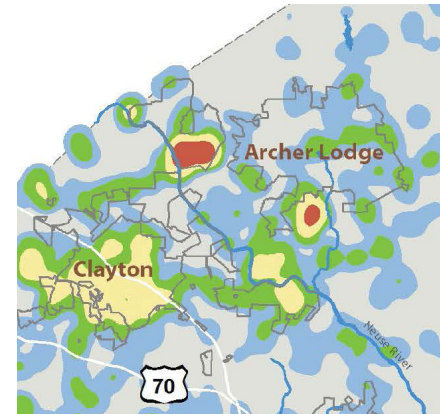
Figure 4.1 lists the breakdown of the most common types or outdoor facilities in relation to population as identified by NRPA. The numbers have been compared to the facilities in Archer Lodge given the current town population of 5,365 residents as well as the projected 2040 population of 7,457 residents.

Activity	Standard/ Population	Currently needed by Archer Lodge	Current Standard Met?	Needed by Archer Lodge in 2040	2040 Standard Met?
Baseball (adult and high school)	1 field for up to 10,000 residents	1 field	No	1 field	No
Baseball (youth)	1 field for up to 6,000 residents	1 field	Yes	2 fields	Yes
Basketball court (standalone)	1 court for up to 8,000 residents	1 court	No	1 court	No
Dog park	1 park for up to 46,917 residents	1 park	No	1 park	No
Football field	1 field for up to 10,000 residents	1 field	No	1 field	No
Playground	1 playground for up to 3,750 residents	2 playgrounds	No	2 playgrounds	No
Soccer field	1 field for up to 4,000 residents	2 fields	No	2 fields	No
Softball (adult)	1 field for up to 3,000 residents	2 fields	No	3 fields	No
Trail	4.5 miles for up to 20,000 residents	4.5 miles	No	4.5 miles	No
Tennis court	1 court for up to 6,000 residents	1 court	No	2 courts	No

Figure 4.1 NRPA Most Common Facilities Averages in Relation to Current and Future Parks and Recreation Needs of Archer Lodge

RECREATIONAL DEMAND IN JOHNSTON COUNTY

The Johnston County Live, Work, Play Analysis determined composite areas of recreational demand based on overlays of where people live, work, play, and attend school in the County. The image to the right depicts Johnston County's perceived recreational demand around the Town of Archer Lodge.



Demand Concentration:
Low High

Composite recreational demand determined by Johnston County's Live, Work, Play Analysis, from the Johnston County Parks and Recreation Master Plan Update, April 2021 - Not to Scale

PUBLIC INPUT

Public input methods were utilized to assess recreational needs in the Archer Lodge community. These methods include a Parks and Recreation Survey and a public meeting conducted on December 11, 2024.

PARKS AND RECREATION SURVEY

A Parks and Recreation Survey was prepared in order to evaluate the recreational needs and desires of the residents of Archer Lodge. The survey was prepared in both English and Spanish and included 26 questions. The online survey opened on October 30, 2024 and was available for seven weeks. Links to the survey were posted on the Town's website and Facebook, Instagram, and X (formerly Twitter) pages. Informative posters about the survey were displayed around town including at the Community Center. In addition, postcards with QR codes and survey website addresses were mailed out to 2,500 homes. A total of 232 people responded to the survey.

Sixty-six percent of survey respondents live within Archer Lodge and the majority of these residents have lived in the Town for at least three years. Nineteen percent of respondent households include a child five years old or younger. Thirty-one percent of households include a child between the ages of six and ten while 39% include a child between 11-19 years of age.

Over 31% of respondents visit a park or trail two or more times per week with weekdays and weekends between 9:00am and 5:00pm being the most frequent use times. Park users overwhelmingly arrive by car (93%).

When asked about barriers to their participation in recreation programs and use of facilities, 49% of respondents stated that they were unaware of what programs and facilities were offered. Twenty-three percent indicated a lack of facilities and 21% cited



Social media post about the Parks and Recreation Survey

Comprehensive Parks and Recreation Master Plan Update

Top 5 Passive Park Activities:

1. Walking
2. Outdoor Concerts/ Amphitheater
3. Wildlife Observation
4. Canoeing/Kayaking
5. Picnicking

lack of indoor facilities. Fifteen percent are not interested in what is provided.

The survey sought preferences on active park activities, passive park activities, classes and programs, and special events. The top five responses for each category are shown at the left. The results are in line with national and state recreational trends.

The top five initiatives that respondents believe should be prioritized in order of preference are:

Top 5 Active Park Activities:

1. Fitness Trail/Outdoor Fitness Equipment
2. Indoor Gym
3. Playing on a Playground
4. Swimming
5. Running/Jogging

1. Develop non-motorized trails for walking and biking that connect schools, parks, neighborhoods, and other facilities
2. Develop more passive recreation opportunities (hiking, picnicking, etc.)
3. Develop more active recreation opportunities (ball fields, soccer, etc.)
4. Develop more indoor recreation facilities (community center, gyms, pools, etc.)
5. Preserve natural areas

Top 5 Classes and Programs:

1. Fitness Classes
2. Arts and Crafts
3. Music
4. Cooking
5. Ceramics/Pottery

Finally, the survey demonstrated support of greater recreational opportunities for the Town of Archer Lodge. Fifty-nine percent of respondents indicated that they are willing to pay higher fees for more and/or improved recreational facilities. The Parks and Recreation Survey is in Appendix B, and the survey results are in Appendix C.

PUBLIC MEETING

The Public Input Meeting was held on the evening of December 11, 2024 at the Archer Lodge Town Hall. The meeting was held as a drop-in event. Five residents attended as well as the Town Mayor, one Town Council member, the Town Administrator, the Parks and Recreation Director, and the Town Planner. Inclement weather may have resulted in a smaller turnout for the meeting. The Public Meeting minutes can be found in Appendix A, Public Meeting Minutes.

Attendees were asked to review the Regional Connections Map (Figure 3.4 in Chapter 3) showing existing and proposed parks, greenways, schools, and recreation facilities. Markers were provided so attendees could indicate locations for any additional parks, greenways, or connections they felt were

Top 5 Special Events:

1. Farmers Markets
2. Outdoor Movies and Music
3. Festivals and Fairs
4. Parades and Holiday Events
5. Performances and Concerts

Comprehensive Parks and Recreation Master Plan Update

needed. Likewise, a map of Archer Lodge divided into four quadrants and showing adopted and recommended and future greenway/trail connections was provided (Figure 4.2, Map of Planned and Recommended Greenway Corridors). Attendees were asked to indicate which quadrant the Town should focus its efforts for land acquisition for future park and recreation facilities and which quadrant for more greenways and connections. Quadrant 1 (northwest quadrant) received the most votes for both land acquisition and additional connections.

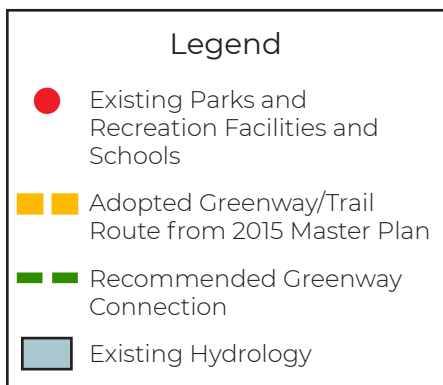
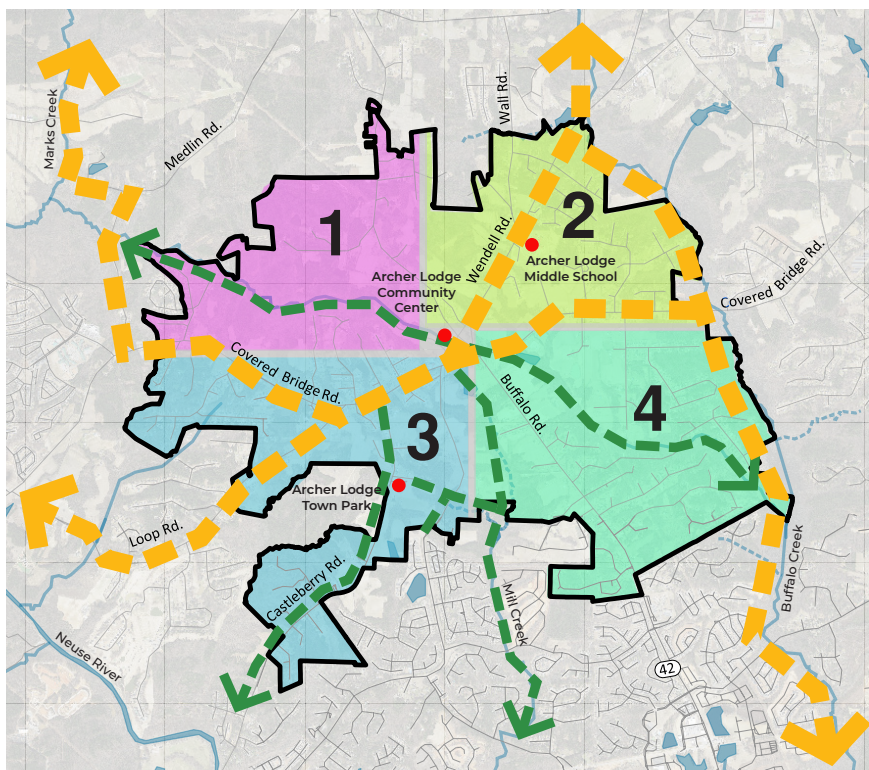


Figure 4.2: Map of Planned and Recommended Greenway Corridors - Not to Scale

archer_lodge

PUBLIC MEETING

Wednesday, December 11, 2024
5:00 - 7:00 P.M.

The Town of Archer Lodge invites the public to attend back-to-back drop-in events from 5:00 p.m. to 7:00 p.m. regarding an inclusive Playground at Archer Lodge Town Park and an update to the Town's Parks and Recreation Master Plan.

The purpose of the first meeting is to present and receive feedback on the Inclusive Playground to be added to Archer Lodge Town Park.
Time: 5:00 to 6:00 p.m.

The purpose of the second meeting is to seek public input on updates to be made to the existing Comprehensive Parks and Recreation Master Plan
Time: 6:00 - 7:00 p.m.

Citizens interested in attending the meetings or in taking the Parks and Recreation Survey may check the Town's website for additional information at www.archerlodgenc.gov.

Location: Archer Lodge Town Hall
14094 Buffalo Rd.
Archer Lodge, NC

6 0 0

archer_lodge The Town of Archer Lodge invites the public to attend back-to-back drop-in events from 5:00 p.m. to 7:00 p.m. on Wednesday, December 11, 2024 in the

Social media post about the Public Meeting



Public Meeting held on December 11, 2024

Comprehensive Parks and Recreation Master Plan Update

Attendees were also asked to take part in a “red dot exercise” to show parks and recreation preferences. Four sets of boards with the following themes that match the Parks and Recreation Survey were presented: (1) passive park activities, (2) active park activities, (3) classes and programs, and (4) future initiatives. Each attendee was given four sets of three red dot stickers. They were asked to place their stickers on the boards to indicate their three preferred activities, classes, or initiatives.

The following received the highest ranking:

PASSIVE PARK ACTIVITIES



Outdoor Concerts/
Amphitheater



Walking

ACTIVE PARK ACTIVITIES



Fitness Trail/Outdoor
Fitness Equipment



Pickleball



Track and Field



Swimming

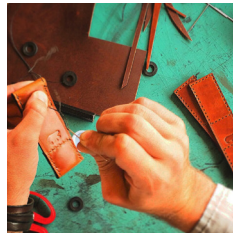
CLASSES & PROGRAMS



Fitness Classes



Yoga



Arts and Crafts



Day Camps

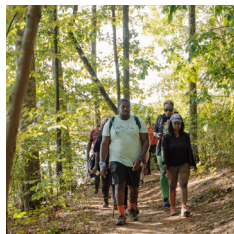


Senior Programs

FUTURE INITIATIVES



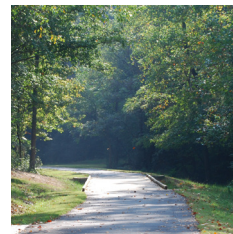
Preserve Natural
Areas



Develop Passive
Recreation
Opportunities



Acquire Land for
Recreation



Develop Non-
motorized Trails for
Walking and Biking

CURRENTLY UNDERSERVED AREAS

Based on the needs assessment using the National Recreation and Parks Association (NRPA) Agency Performance Review, the Town of Archer Lodge is currently underserved. Public input revealed that many residents utilize recreation programs and facilities of other towns nearby. Fifty-nine percent of survey respondents indicated that they utilized churches, schools, health clubs, or other organizations for recreation. Among those listed were: Town of Clayton, Johnston County Little League, Neuse River Trail, Wendell Parks and Recreation, Smithfield Aquatics Center, and Zebulon Parks and Recreation. The current facilities offered by the Town of Archer Lodge are not sufficient to support the recreation demands of the current population in the area, let alone the projected population given current growth trends.



5 MASTER PLAN RECOMMENDATIONS

INTRODUCTION

The purpose of this Master Plan is to outline goals and objectives to help the Town improve recreational opportunities for residents, promote healthy living, and fulfil the vision specified in the Comprehensive Land Use Plan.

As the Town of Archer Lodge and the surrounding region continue to grow, meeting and anticipating the current and future recreational needs of the community is crucial. There is a great need for trails and greenways, additional parks, and other recreational facilities in the Town of Archer Lodge. At the same time, with more citizens moving to the area, the opportunities for available land for park and recreation facilities will continue to decrease.

Archer Lodge is aware that parks and recreation facilities play a crucial role in improving public health by providing spaces for physical activity, social interaction, and mental relaxation. Through the recreation survey, residents expressed their support for more recreation programs and facilities, especially an increase in trails and passive recreation opportunities.

All of these factors contributed to the recommendations outlined in this Master Plan.

“Today and into the future the Town of Archer Lodge, will be a peaceful, family oriented, active community that looks to retain our small-town, agricultural character, meeting the needs of our current and future residents and businesses.”

-Vision Statement of the 2030 Comprehensive Land Use Plan for the Town of Archer Lodge

TOP PARKS AND RECREATION RECOMMENDATIONS:

- **ACQUIRE LAND**
- **DEVELOP PEDESTRIAN AND BICYCLE FACILITIES**
- **DEVELOP A NATURE PARK/PRESERVE WITH PASSIVE RECREATION OPPORTUNITIES**
- **DEVELOP AN ACTIVE/SPORTS PARK WITH INDOOR RECREATION FACILITY**

ACQUIRE LAND

To meet current national standards, Archer Lodge needs an additional:

- 26 acres of parkland
- 4 miles of greenways/trails

By 2040 with the projected population, the Town will need:

- 49 acres of additional parkland
- 3 total parks

Population growth is leading to rapid development in and around Archer Lodge. With available properties diminishing, it is essential for the Town to acquire land to develop future parks, greenways and trails, and recreation facilities. These lands will be critical to address the community's desired increase in recreation opportunities. The Town should explore multiple avenues to raise the needed funds including: grants, payments in lieu by developers, use of the general fund, private land donations, and partnerships with businesses, schools, non-profits, or healthcare organizations. Many potential funding sources are described in Appendix D, Funding Opportunities and Creative Partnerships.

In Figure 5.1, Prioritization for Park Land Acquisition Areas, quadrants 1 and 4 would be the most desirable areas for future park development. While it is likely that a park and/or other recreational facility in quadrant 2 may be needed in the future, that area is experiencing the least development pressure. At the December 11, 2024 Public Meeting, residents prioritized quadrants 1 and 4 as areas that are in most need of park and recreation facilities. Continued re-evaluation of development patterns and recreational needs will be necessary to help guide future land acquisitions. If the population of the town increases faster than expected, additional park land may be needed.

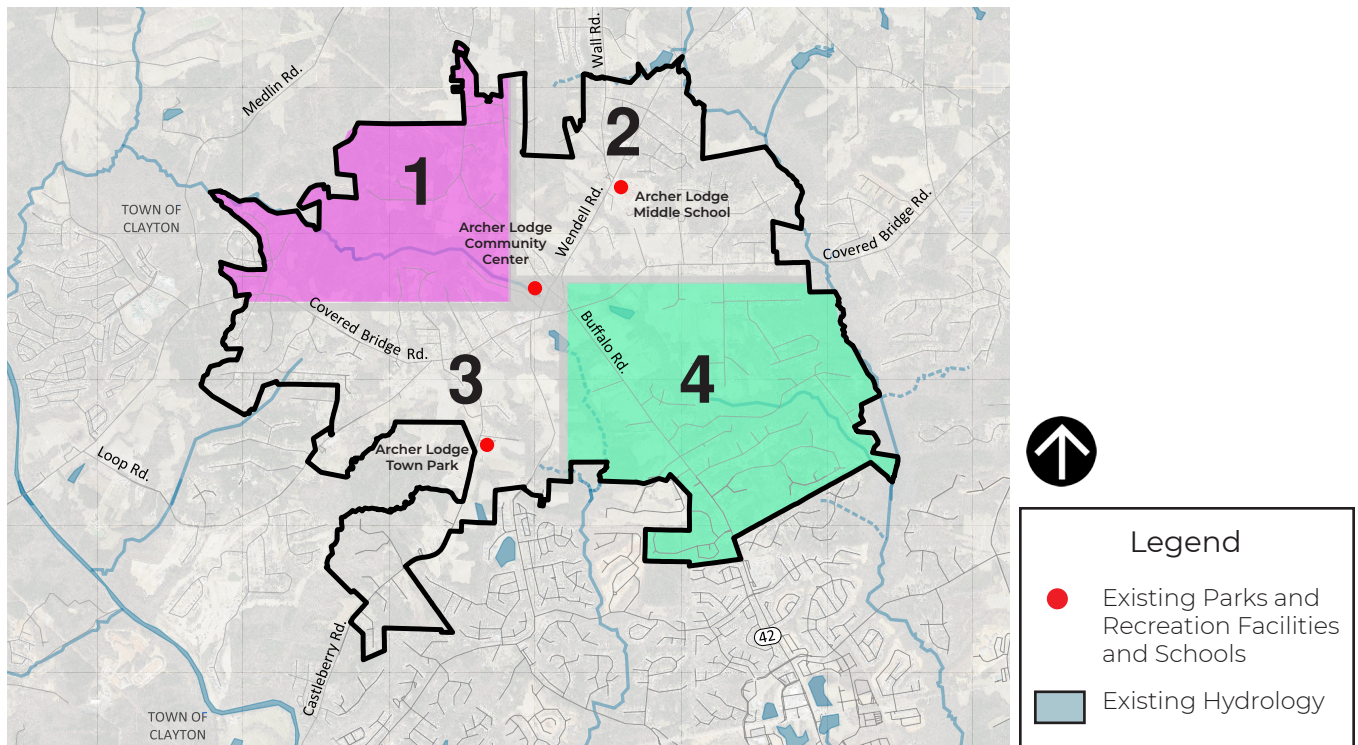


Figure 5.1: Prioritization for Park Land Acquisition Areas - Not to Scale

DEVELOP PEDESTRIAN AND BICYCLE FACILITIES

Archer Lodge should develop a network of greenways, trails, sidewalks, and multiuse paths. The benefits of bicycle and pedestrian corridors are:

- the improvement of health outcomes by providing opportunities for residents to incorporate physical activity into their daily lives
- the ability to choose active mobility for short, local trips
- the preservation of wildlife corridors and natural systems like streams and wetlands that helps improve water quality
- the economic advantages of increases in property values, reductions in personal transportation costs, and promotion of local businesses by encouraging foot traffic

Comprehensive Parks and Recreation Master Plan Update

- the opportunity to connect to the regional network of parks, greenways, and trails shown in Figure 5.2, Regional Connectivity Map

Obstacles to establishing these facilities include:

- high-speed roadways that may lack adequate right-of-way and that may be in need of retrofitting for bike lanes, multiuse paths, and sidewalks
- the costs of purchasing land or easements for greenways and trails
- negotiating with utility providers for access to their corridors for trails

Notwithstanding the obstacles, the Town of Archer Lodge recognizes the importance of non-motorized trail options as demonstrated with the adoption of the 2020 Bicycle & Pedestrian Plan. This plan includes recommendations for pedestrian and bicycle connectivity which will offer citizens more opportunities for recreation and alternative modes of transportation. Residents also recognized the benefits of these facilities and prioritized the development of trails for walking and biking in the Parks and Recreation Survey. Since reducing traffic, improving the quality of life, and supporting national health initiatives are priorities at the national level as well, there are grants such as the Transportation Alternatives that may be used for a variety of pedestrian and bicycle projects including sidewalks, bikeways, and multiuse paths.

Figure 5.3, Map of Planned and Recommended Greenway Corridors shows greenways and trails adopted from the 2015 Archer Lodge Comprehensive Parks and Recreation Master Plan with yellow dashed lines. In addition to these, the green dashed lines illustrate additional recommended corridors that utilize the system of creeks and tributaries in and around the Town. With greenways along Marks Creek, Mills Creek, Buffalo Creek, and connections to Archer Lodge Town Park, residents will have additional options for walking or biking along safe pathways.

Comprehensive Parks and Recreation Master Plan Update

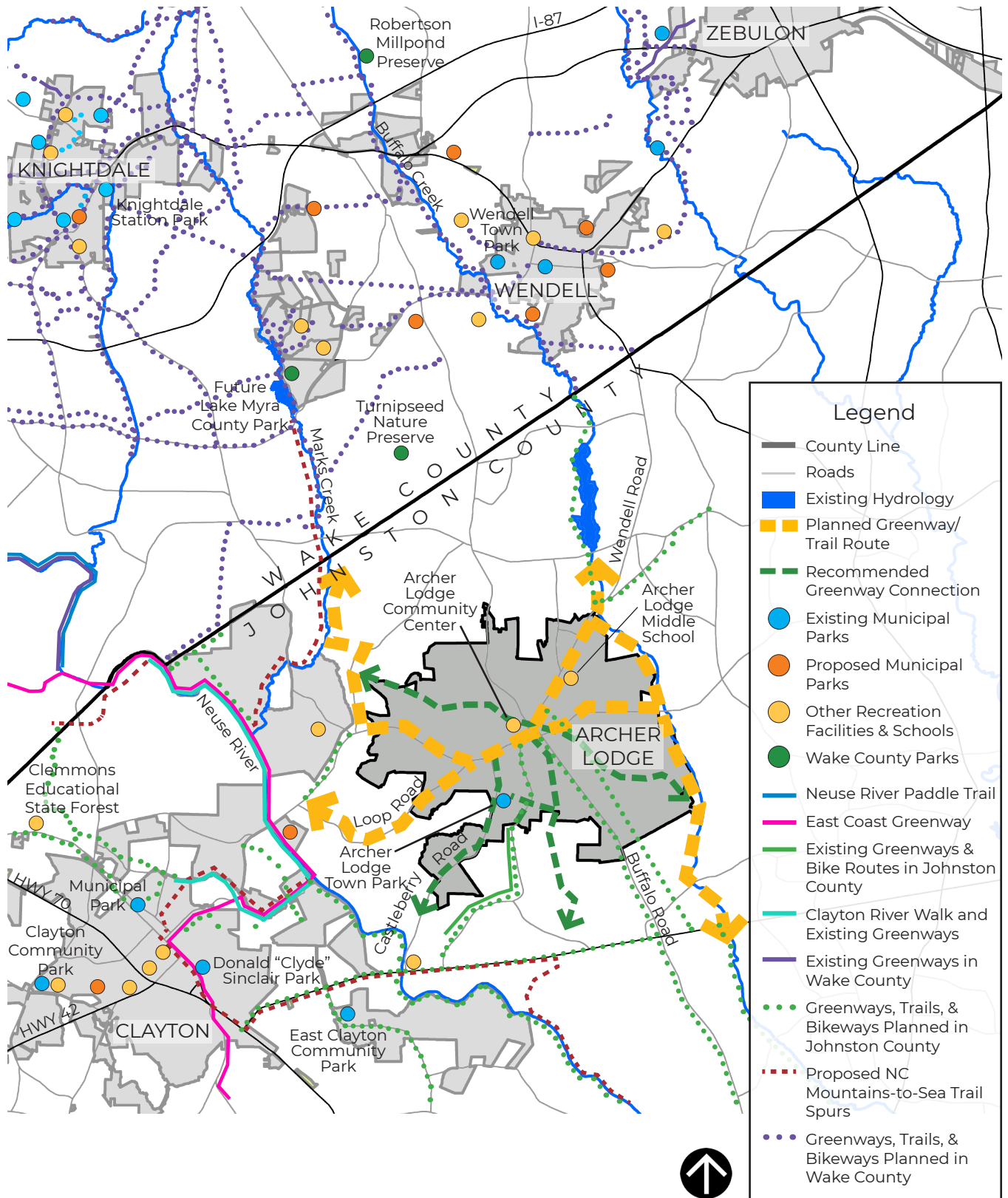


Figure 5.2: Regional Connectivity Map - Not to Scale



Comprehensive Parks and Recreation Master Plan Update

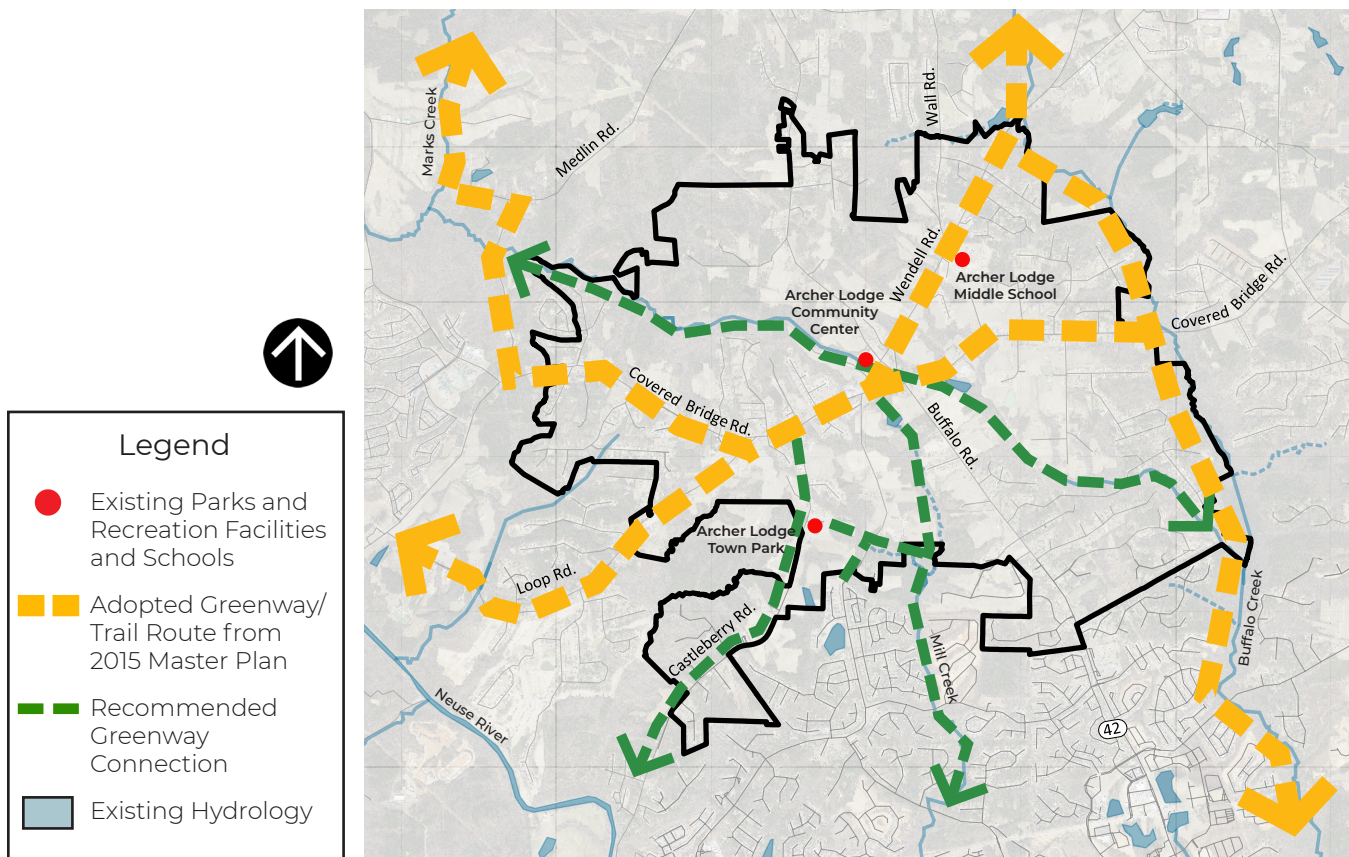


Figure 5.3: Map of Planned and Recommended Greenway Corridors - Not to Scale

DEVELOP A NATURE PARK/PRESERVE WITH PASSIVE RECREATION OPPORTUNITIES

The Town should seek opportunities to preserve existing natural areas for passive recreation and open space protection. Opportunities associated with creating a nature preserve include:

- the conservation of agricultural areas that maintain the rural, country, farming community character that residents appreciate
- the ability to provide for a variety of recreation activities:
 - walking
 - hiking
 - practicing yoga
 - fishing
 - attending outdoor concerts and performances
 - running or jogging
 - picnicking
 - observing wildlife
 - stargazing

- the promotion of active living and improved health by providing safe and accessible facilities for exercising, relaxing, and gathering
- the preservation of wildlife habitat and natural systems

As with the other recommendations, funding will be a primary hurdle. Pursuing grants is an excellent way to find assistance. The North Carolina Parks and Recreation Trust Fund provides matching funds specifically for renovating and building recreation facilities as well as land acquisition. Likewise, the Land and Water Conservation Fund and the North Carolina Land and Water Fund provide matching grants to municipalities to create and develop facilities. Another option could be partnering with organizations with a focus on public health to assist with securing funding through grants and donations.

DEVELOP AN ACTIVE/SPORTS PARK WITH INDOOR RECREATION FACILITY

Building an athletics-focused park with an indoor recreation facility creates several opportunities for Archer Lodge such as:

- additional active recreation activities:
 - tennis and pickleball
 - basketball
 - adult baseball and softball
 - playing on a playground
 - soccer
 - football
 - swimming
 - running track
- facilities for classes and programs:
 - ceramics and pottery
 - music and dance lessons
 - day and summer camps
 - senior and teen programs
 - fitness classes
 - arts and crafts
 - cooking classes
 - yoga
- host tournaments and special events which can be economic drivers for the region
- provide for the additional active recreation facilities the Town will need by 2040 to meet national standards:
 - 1 baseball field for adults
 - 3 softball fields for adults
 - 1 basketball court
 - 1 additional playground
 - 2 soccer fields
 - 2 tennis courts
 - 1 dog park
 - 1 football field

In addition to the various funding options already mentioned and listed in Appendix D, seeking business partners may be a great way to help fund this athletic park. Businesses can sponsor specific features within the park and have their signs displayed on athletic fencing. Participating companies benefit by improving the local quality of life, attracting more employees to the area, and by being good neighbors to the community.

ADDITIONAL RECOMMENDATIONS

EXPAND PARKS AND RECREATION DEPARTMENT AND PROGRAMMING AND SERVICES

As communities grow and evolve, the role of parks and recreation departments becomes increasingly crucial in promoting public health, social well-being, environmental sustainability, and the overall livability of a region. With the expansion of park, greenway and trail, and recreation facilities, the Archer Lodge Parks and Recreation Department will need to grow in kind.

The NRPA reports the average number of full-time employees is 8.9 per 10,000 residents with 46% of the staff dedicated to operations and maintenance. To meet these current national standards, the Parks and Recreation Department would need to add two full-time employees. With the projected 2040 population, the department will need to expand to at least seven employees.

BUILD PUBLIC SUPPORT

Public support and awareness of parks and recreation programs is an ongoing effort that requires strategic communication, strong community relationships, and consistent advocacy. Ultimately, this effort can lead to increased participation, sustainable funding, and a stronger sense of community ownership over public spaces. The Town should make every effort to involve the community in all steps of the process. Many funding sources require public input meetings, public support, and adoption of comprehensive and site-specific master plans. The Town should utilize preferred methods to advertise parks and recreation developments and programs. From the

Parks and Recreation Survey we know that the majority of respondents find out about programs and activities via social media. Parks and recreation information should be posted on the Town's website as well as social media pages. Additionally, having email and postal mail lists is important for distributing timely or important information and to reach the broader community.

ACTION STEPS

- Establish potential partnerships
- Acquire park land with Town funds, grants, and other partnerships
- Develop parks, greenways, and other recreational facilities in phases to address demands and regional connectivity
- Expand the Parks and Recreation Department as well as the programming and services offered
- Continue marketing and communication to build public knowledge and support

SUMMARY

Based on the findings outlined in this Master Plan, there is a great need for more parks and recreation facilities in the Town of Archer Lodge. This need will continue to grow as the area becomes more developed and populated. The Parks and Recreation Survey indicated public support for more recreation programs and facilities and for the recommendations outlined in this Master Plan. The plan is intended to be part of the long-range development of park and recreation facilities and programs in Archer Lodge and should be evaluated regularly as fiscal conditions change or opportunities and potential partnerships arise.

Comprehensive Parks and Recreation Master Plan Update

A APPENDIX A: PUBLIC MEETING MINUTES

Public Input Meeting - Archer Lodge Comprehensive Parks and Recreation
Master Plan Update
December 11, 2024, 6:00-7:00pm

Archer Lodge Town Hall Council Chambers
14094 Buffalo Road
Archer Lodge, NC 27527

1. Welcome and Introductions – Mindy Arthur and Susan Hatchell greeted meeting attendees as they arrived. Everyone in attendance was asked to sign the attendance sheet. In addition to Mindy and Susan, there were 10 people in attendance. Inclement weather may have resulted in a smaller turnout for the meeting.
2. Presentation on the Comprehensive Master Plan Update – Mindy Arthur explained that the Town of Archer Lodge is in the process of updating its Comprehensive Parks and Recreation Master Plan. The original plan is almost ten years old, and many organizations require an updated plan for their grants. Additionally, the Town has developed a Parks and Recreation department and a town park since the original master plan was prepared. Having an updated plan will help guide the Town's parks and recreation efforts moving forward.
3. Meeting Attendee Participation – Attendees were asked to review the Regional Connections map that showed existing and proposed parks, greenways, schools, and recreation facilities. Markers were provided so attendees could indicate locations for any additional parks, greenways, or connections they felt were needed. Likewise, a map of Archer Lodge divided into four quadrants and showing recommended and future greenway/trail connections was provided. Attendees were asked to indicate which quadrant the Town should focus its efforts for land acquisition for future park and recreation facilities and which quadrant for more greenways and connections. Quadrant 1 (northwest

Comprehensive Parks and Recreation Master Plan Update

quadrant) received the most votes for both land acquisition and additional connections.

Attendees were asked to take part in a red dot exercise as well. There were four sets of boards with the following themes: (1) active park activities, (2) passive park activities, (3) classes and programs, and (4) future initiatives. Each attendee was given four sets of three red dot stickers. They were asked to place their stickers on the boards to indicate their three preferred activities, classes, or initiatives.

Preferred Active Park Activities:

Pickleball (4 votes)
Track and Field (4 votes)
Fitness Trail/Outdoor Fitness Equipment (4 votes)
Swimming (3 votes)
Disc Golf (2 votes)
Soccer (2 votes)
Cycling/biking (2 votes)
Indoor Gym (2 votes)
Basketball (2 votes)
Mini Golf (2 votes) – this item was added to the board by an attendee
Archery (2 votes)
Running/Jogging (1 vote)
Ropes Course (1 vote)
Sprayground/splashpad (1 vote)

Preferred Passive Park Activities:

Outdoor Concerts/Amphitheater (6 votes)
Walking (3 votes)
Attending Art Shows (2 votes)
Playing on a Game Court (2 votes)
Wildlife Observation (2 votes)
Canoeing/Kayaking (2 votes)
Bird Watching (2 votes)
Attending Family Reunions (1 vote)
Gardening (1 vote)
Nature Study (1 vote)
Visiting a Dog Park (1 vote)
Picnicking (1 vote)
Stargazing (1 vote)
Frisbee (1 vote)

Preferred Classes and Programs:

- Fitness Classes (3 votes)
- Yoga (3 votes)
- Arts and Crafts (3 votes)
- Day Camps (3 votes)
- Senior Programs (3 votes)
- Theater/Drama (2 votes)
- First Aid (2 votes)
- Special Needs Programs (2 votes)
- Survival (1 vote)
- Swimming Lessons (1 vote)
- After School/Track-Out Camps (1 vote)
- Teambuilding (1 vote)
- Card Games/Bingo (1 vote)
- Teen Programs (1 vote)

Preferred Future Initiatives:

- Develop Passive Recreation Opportunities (4 votes)
- Preserve Natural Areas (4 votes)
- Acquire Land for Recreation (3 votes)
- Develop Non-motorized Trails for Walking and Biking that Connect Schools, Parks, Neighborhoods, and Other Facilities (3 votes)
- Develop Active Recreation Opportunities (2 votes)
- Develop Indoor Recreation Opportunities (2 votes)
- “Do Nothing Else” was a written comment

4. Public Comments – The following summarizes comments received:
 - One attendee suggested the Town could use a nature park with trails through a forest like Turnipseed Nature Preserve.
 - One attendee wasn't aware of the recreation programs being offered by the Town and has his children signed up for sports in neighboring communities.

Meeting minutes submitted by Mindy Arthur, 12/16/2024

Comprehensive Parks and Recreation Master Plan Update

B APPENDIX B: PARKS AND RECREATION SURVEY QUESTIONS

Survey in English

Please take a moment to respond to the following questions. This survey will help the Town of Archer Lodge gain valuable public feedback about parks and recreation facilities and programs. Your opinion is greatly valued!

1. Have you or your family participated in any Town of Archer Lodge Parks and Recreation programs in the past 12 months?
Yes / No / If yes, please list:

2. How often do you and your family visit a park or trail?
Every day
2 or more times per week
2 or more times per month
A few times per year
Rarely
Never

3. What times of the day would you be most likely to use a park or trail facility?
During the week before 9 am
During the week between 9 am and 5 pm
During the week after 5 pm
During the weekend before 9 am
During the weekend between 9 am and 5 pm
During the weekend after 5 pm

4. Please indicate which parks and trails and community facilities you have visited over the past year. Select all that apply.
Archer Lodge Town Park on Castleberry Road
Archer Lodge Community Center
E. Clayton Community Park
Clayton Community Park
Clayton Municipal Park
Turnipseed Nature Preserve
Flower Hill Nature Preserve

Comprehensive Parks and Recreation Master Plan Update

5. What other municipal parks/facilities, schools, health clubs, places of worship, or other organizations do you use for recreation?
6. Which park or recreational facility is closest to your home?
7. For the most recent visit by anyone in your household to any park or recreational facility, how did they get there?
 - Arrived by car
 - Walked
 - Biked
 - Have never visited
 - Other (please specify):
8. In a typical week, how many days do you exercise?
 - I don't exercise often
 - Once a week
 - 2-4 days a week
 - 5-7 days a week
9. How often do you visit Archer Lodge Town Park on Castleberry Road?
 - Every day
 - 2 or more times per week
 - 2 or more times per month
 - A few times per year
 - Rarely
 - Never
10. Please rate your interest in the active athletic activities listed below:
Extremely interested / Moderately interested / Not at all interested
 - Disc golf
 - Soccer
 - Spring soccer
 - Football
 - Cycling/Biking
 - Mountain biking
 - Running/Jogging
 - Indoor gym
 - Skateboarding
 - Volleyball

Comprehensive Parks and Recreation Master Plan Update

Indoor volleyball
Playing on a playground
Baseball
Basketball
Rollerblading
Inline hockey
Tennis
Pickleball
Softball
Lacrosse
Playing in a sprayground/splashpad
Kickball
Track and field
Cheerleading
Fitness trail/outdoor fitness equipment
Swimming
Pickleball
T-ball
Ropes course
Archery
Other active activities you are interested in:

11. Please rate your interest in the passive activities listed below:

Extremely interested / Moderately interested / Not at all interested

Walking
Wildlife observation
Picnicking
Outdoor concerts/amphitheater
Fishing
Canoeing/kayaking
Camping
Visiting historic sites
Bird watching
Stargazing
Frisbee
People watching
Attending family reunions
Gardening
Yoga/Pilates
Attending art shows or festivals
Nature study

Comprehensive Parks and Recreation Master Plan Update

Walking on interpretive trails
Photography
Visiting a dog park
Playing on game courts (bocce, horseshoes, shuffleboard)
Other passive activities you are interested in:

12. Please rate your interest in the classes and programs listed below:

Extremely interested / Moderately interested / Not at all interested

Fitness classes
Dance
Cooking
Ceramics and pottery
Theater/drama
Martial arts
Yoga
First aid
Survival
Swimming lessons
Arts and Crafts
Music
After school/track-out camps
Day camps
Teambuilding
Card games, bingo
Educational trips (zoos, museums, etc.)
Dog obedience
Play groups, parent's night out
Teen programs
Senior programs
Special needs programs
Other classes and programs you are interested in:

13. Please rate your interest in the special events listed below:
Extremely interested / Moderately interested / Not at all interested

Festivals and fairs
Track and field meet
Farmers markets
Vendor fairs
Fishing derby
Agricultural heritage days

- Car shows
- Book fairs
- Performances and concerts
- Outdoor movies and music
- Parades and holiday events
- Wedding and other rental venues (for reunions, birthday parties, other events)
- Food truck rodeos
- Other special events you are interested in:

14. Which initiatives should the Town of Archer Lodge prioritize for future implementation? Check all that apply.

- Develop active recreation opportunities (ball fields, soccer etc.)
- Develop passive recreation opportunities (hiking, picnicking, etc.)
- Develop indoor recreation facilities (recreation center, gyms, pools etc.)
- Acquire land for recreation
- Preserve natural areas
- Develop nature and historical or cultural programs
- Develop non-motorized trails for walking and biking that connect schools, parks, neighborhoods other facilities
- None of the above

15. Which (if any) of the following do you feel are barriers to your participation in Town of Archer Lodge recreational programs and facilities? Select all that apply.

- I am not aware of what programs and facilities are offered
- Fees/cost of program too high
- Facilities are not close to my home
- Facilities do not feel safe
- Lack of restrooms
- Lack of Parking
- Not interested in what is provided
- Not enough time
- Pedestrian access to parks
- Limited means of Transportation
- Timing of events
- Overcrowding
- Lack of facilities
- Facilities are not up to date

Comprehensive Parks and Recreation Master Plan Update

Facilities are not well maintained
Lack of indoor facilities
Lack of accommodations for those with accessibility limitations
None of the above
Other (please specify):

16. Please list any athletic leagues that you have participated in during the past 12 months (if any):
17. Would you be willing to pay higher fees for more recreation programs and/or improved facilities?
Yes / No / Why or why not?
18. Rank the following Town of Archer Lodge initiatives based on your preference for future implementation from 1 (most preferred) to 7 (least preferred):
 - Improve and enhance existing facilities
 - Develop more active recreation (ball fields, soccer etc.) opportunities
 - Develop more passive recreation (hiking, picnicking, etc.) opportunities
 - Develop more indoor recreation facilities (community center, gyms, pools etc.)
 - Preserve natural areas
 - Develop nature and historical or cultural programs
 - Develop non-motorized trails for walking and biking that connect schools, parks, neighborhoods and other facilities
19. How best would you learn about upcoming parks and recreation activities? Please select the top 3 most important to your household:
 - Friends and neighbors
 - Newspaper
 - Brochures/newsletters/flyer
 - Town website
 - Internet search engine (Google, Bing, etc.)
 - Television/radio
 - Information at parks/facility kiosks
 - E-mail list
 - Facebook/social media
 - Other:

Comprehensive Parks and Recreation Master Plan Update

20. Do you live within the Archer Lodge town limits?
Yes / No
21. What is your zip code?
22. How many years have you lived in Archer Lodge?
23. What is your gender?
Female
Male
Gender non-conforming
Prefer not to answer
24. What is your race/ethnicity?
Black or African American
American Indian or Alaska Native
Asian or Asian American
Hispanic or Latino
Native Hawaiian or other Pacific Islander
White or Caucasian
Two or more races
Prefer not to answer
Other (please specify):
25. List the number of persons in your household including yourself who are in the age brackets below:
0 to 5 years
6 to 10 years
11 to 19 years
20 to 29 years
30 to 39 years
40 to 49 years
50 to 59 years
Age 60 or older
26. Please share any additional thoughts/comments:

Thank you for taking the time to give us your ideas for the Town of Archer Lodge!

Comprehensive Parks and Recreation Master Plan Update

Survey in Spanish

Tómese un momento para responder a las siguientes preguntas. Esta encuesta ayudará a la ciudad de Angier a obtener valiosos comentarios del público sobre los parques y las instalaciones y programas recreativos existentes y futuros. ¡Su opinión es muy valorada!

1. ¿Ha participado usted o su familia en algún programa de Parques y Recreación de la Ciudad de Archer Lodge en los últimos 12 meses?
Sí / No / En caso afirmativo, por favor indique en cuales.
2. ¿Con qué frecuencia usted y su familia visitan un parque o sendero?
Todos los días
2 o más veces por semana
2 o más veces por mes
Algunas veces al año
Raramente
Nunca
3. ¿A qué horas del día es más probable que use un parque o sendero?
Durante la semana antes de las 9 am
Durante la semana entre 9 am y 5 pm
Durante la semana después de las 5 pm
Durante el fin de semana anterior 9 am
Durante el fin de semana entre 9 am y 5 pm
Durante el fin de semana después 5 pm
4. Indique qué parques y senderos e instalaciones comunitarias ha visitado durante el año pasado. Seleccione todas las que correspondan.
Archer Lodge Town Park en Castleberry Road
Archer Lodge Community Center
E. Clayton Community Park
Clayton Community Park
Clayton Municipal Park
Turnipseed Nature Preserve
Flower Hill Nature Preserve

Comprehensive Parks and Recreation Master Plan Update

5. ¿Qué otros parques / instalaciones municipales, escuelas, clubes de salud, lugares de culto u otras organizaciones utiliza para la recreación?
6. ¿Qué parque o instalación recreativa está más cerca de su hogar?
7. En la visita más reciente de alguien de su hogar a cualquier parque o instalación recreativa, ¿cómo llegó allí?
 - Llegamos en coche
 - Caminábamos
 - Fuimos en bicicleta
 - Nunca hemos visitado
 - Otros:
8. En una semana normal, ¿cuántos días haces ejercicio?
 - No hago ejercicio a menudo
 - Una vez a la semana
 - De 2 a 4 días a la semana
 - De 5 a 7 días a la semana
9. ¿Cómo calificaría la condición física de Archer Lodge Town Park en Castleberry Road?
 - Mal
 - Satisfactorio
 - Buena
 - Excelente
 - Sin opinión
10. Califique su interés en las actividades deportivas que se enumeran a continuación:
 - Extremadamente interesado / Moderadamente interesado / Nada interesado
 - Disco de golf
 - Fútbol
 - Fútbol americano
 - Ciclismo/ andar en bicicleta
 - Bicicleta de montaña
 - Correr/trotar
 - Gimnasio cubierto
 - Patineta
 - Vóleibol
 - Voleibol de interior

Comprehensive Parks and Recreation Master Plan Update

Jugando en un patio de recreo
Béisbol
Baloncesto
Patinar
Hockey en línea
Tenis
Pickleball
Sofbol
Lacrosse
Jugando con un rociador de agua
Kickball
Atletismo
Porristas
Pista de fitness
Nadando
Béisbol para niños
Escalada con cuerda/poleas
Tiro al arco
Otras actividades deportiva que le interesen:

11. Califique su interés en las actividades relajantes enumeradas a continuación:
Extremadamente interesado / Moderadamente interesado / Nada interesado
- Caminando
 - Observación de la vida silvestre
 - Picnic
 - Conciertos al aire libre/ anfiteatro
 - Pesca
 - Canotaje/kayak
 - Cámping
 - Visitar sitios históricos
 - Observación de aves
 - Estudio de las estrellas
 - Frisbee
 - Gente mirando
 - Asistir a reuniones familiares
 - Jardinería
 - Yoga/Pilates
 - Asistir a exposiciones de arte o festivales
 - Estudio de la naturaleza
 - Caminando por senderos interpretativos
 - Fotografía

Comprehensive Parks and Recreation Master Plan Update

Visitando un parque para perros

Jugando en canchas de juego (bochas, herraduras, tejo)

Otras actividades relajantes que le interesen:

12. Califique su interés en las clases y programas enumerados a continuación:

Extremadamente interesado / Moderadamente interesado /

Nada interesado

Clases de fitness

Danza

Cocinando

Cerámica

Teatro/drama

Artes marciales

Yoga

Primeros auxilios

Supervivencia

Clases de natación

Artes y manualidades

Música

Campamentos después de la escuela

Campamentos de un día

Actividades grupales

Juegos de cartas, bingo

Viajes educativos (zoológicos, museos, etc.)

Entrenamiento de mascotas

Grupos de juego, noche de padres

Clases de adolescents

Clases senior

Programas de necesidades especiales

Otras clases y programas que le interesen:

13. Califique su interés en los eventos especiales que se enumeran a continuación:

Extremadamente interesado / Moderadamente interesado /

Nada interesado

Fiestas y ferias

Encuentro de atletismo

Mercados de agricultores

Ferias de vendedores

Derby de pesca

Jornadas del patrimonio agrícola

Shows de autos

Comprehensive Parks and Recreation Master Plan Update

- Feria del libro
- Actuaciones y conciertos
- Películas al aire libre
- Desfiles y festivales
- Bodas y otros lugares de alquiler (para reuniones, fiestas de cumpleaños, otros eventos)
- Food truck rodeos/carritos de comida
- Otros eventos especiales que le interesen:

14. ¿Qué iniciativas debería priorizar la ciudad de Archer Lodge para su implementación futura? Marque todas las opciones que correspondan.

- Desarrollar oportunidades de recreación deportiva (campos de béisbol, fútbol, etc.)
- Desarrollar oportunidades de recreación relajante (senderismo, picnics, etc.)
- Desarrollar instalaciones de recreación en interiores (centro de recreación, gimnasios, piscinas, etc.)
- Adquirir terrenos para recreación
- Preservar áreas naturales
- Desarrollar programas naturales, históricos o culturales
- Desarrollar senderos no motorizados para caminar y andar en bicicleta que conecten escuelas, parques, vecindarios y otras instalaciones
- Ninguno

15. ¿Cuál de las siguientes (si alguna) considera que son barreras para su participación en los programas e instalaciones recreativas de la ciudad de Archer Lodge? Seleccione todas las que correspondan.

- No sé qué programas e instalaciones se ofrecen
- Honorarios/costo del programa demasiado alto
- Las instalaciones no están cerca de mi casa
- Las instalaciones no se sienten seguras
- Falta de baños
- Falta de estacionamiento
- No estoy interesado en lo que se proporciona
- No hay tiempo suficiente
- Acceso peatonal a parques
- Medios de transporte limitados
- Calendario de eventos
- Superpoblación
- Falta de servicios

Las instalaciones no están actualizadas
Las instalaciones no están bien mantenidas
Falta de instalaciones para actividades en interiores
Falta de instalaciones para personas con limitaciones físicas
Ninguna de las anteriores
Otro:

16. Enumere las ligas deportivas en las que haya participado durante los últimos 12 meses (sí tu respuesta es positiva, menciona cuáles):
17. ¿Estaría dispuesto a pagar tarifas más altas por más programas de recreación y / o instalaciones mejoradas?
Sí / No / ¿Por qué sí o por qué no?
18. Clasifique las siguientes iniciativas de la ciudad de Archer Lodge según su preferencia para la implementación futura de 1 (más preferido) a 7 (menos preferido):
Mejorar y mejorar las instalaciones existentes
Desarrollar oportunidades de recreación más activas (campos de pelota, fútbol, etc.)
Desarrollar más oportunidades de recreación pasiva (senderismo, picnic, etc.)
Desarrollar más instalaciones recreativas interiores (centro comunitario, gimnasios, piscinas, etc.)
Preservar espacios naturales
Desarrollar programas naturales y históricos o culturales
Desarrollar senderos no motorizados para caminar y andar en bicicleta que conectan escuelas, parques, vecindarios y otras instalaciones.
19. ¿Cómo te enteras o conoces sobre los parques y actividades recreativas en estos? Seleccione los 3 principales más importantes para su hogar:
Amigos y vecinos
Periódico
Folletos/boletines/flyer
Sitio web de la ciudad
Buscador de Internet (Google, Bing, etc.)
Televisión/radio
Información en parques/quioscos de información
Lista de correo electrónico

Comprehensive Parks and Recreation Master Plan Update

Facebook/ redes sociales

Otro:

20. ¿Vives dentro de los límites de la ciudad de Archer Lodge?
Sí / No

21. Código postal:

22. ¿Cuántos años has vivido en Archer Lodge?

23. ¿Cuál es su género?

Femenina

Masculino

No conforme con su género

Prefiero no responder

24. ¿Con qué grupo racial o étnico se identifica más?

Negro(a)/Afroamericano(a)

Indio(a) Americano(a) o Nativo(a) de Alaska

Asiático(a)

Hispano(a)/Latino(a)

Nativo(a) de Hawai/Otras Isleño(a) del Pacífico

Blanco(a)/Caucásico(a)

Dos o más razas

Prefiero no responder

Otros:

25. Enumere a continuación el número de personas en su hogar, incluido usted, que se encuentran entre las edades que se enumeran a continuación:

0 a 5 años

6 a 10 años

11 a 19 años

20 a 29 años

30 a 39 años

40 a 49 años

50 a 59 años

60 años o más

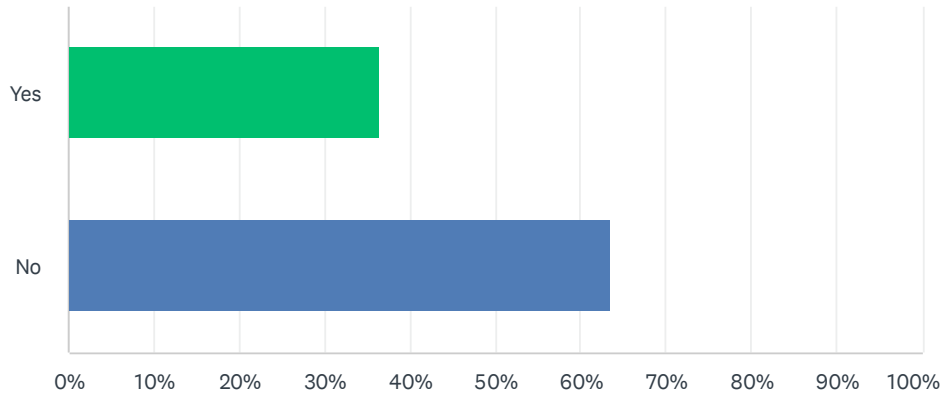
26. Por favor comparta cualquier pensamiento / comentario adicional:

¡Gracias por tomarse el tiempo para darnos sus ideas para la ciudad de Archer Lodge!

C APPENDIX C: PARKS AND RECREATION SURVEY ANSWERS

Q1 Have you or your family participated in any Town of Archer Lodge Parks and Recreation programs in the past 12 months?

Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	36.36% 84
No	63.64% 147
TOTAL	231

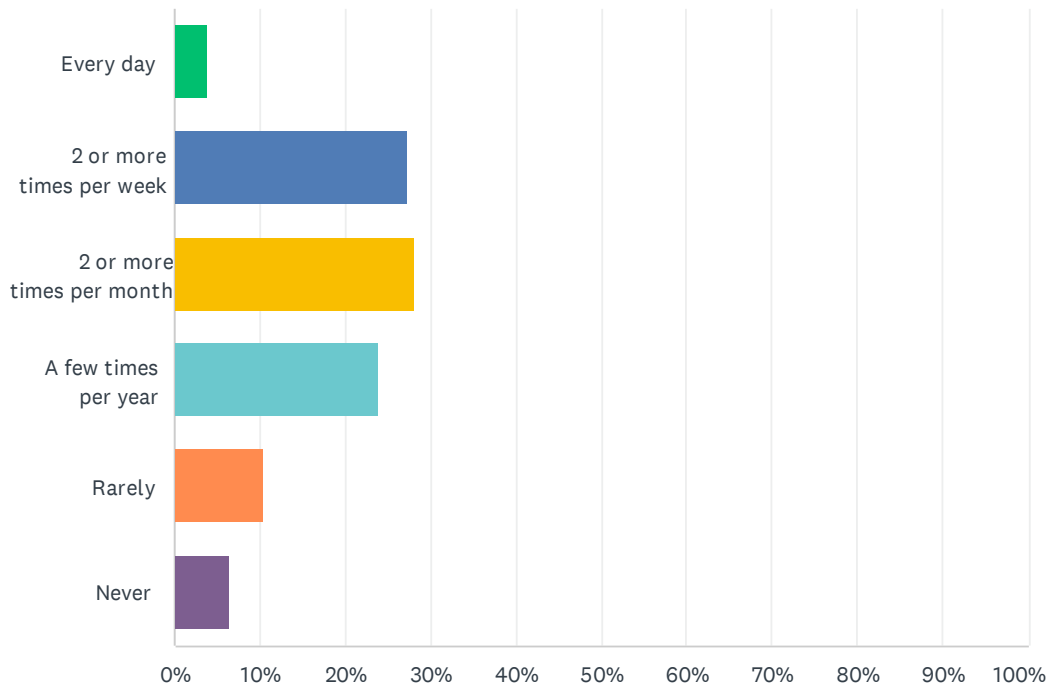
#	IF YES, PLEASE LIST:	DATE
1	4th of July family fun day, popsicles in the park, trunk or treat, Christmas parade	12/12/2024 2:28 PM
2	Park dedication, pavilion naming and use the walking paths	12/11/2024 11:47 AM
3	JCLL Baseball and AL Softball	12/9/2024 12:52 PM
4	Opening of the archer lodge park	12/8/2024 2:52 PM
5	Rec soccer	12/4/2024 7:01 PM
6	Voting watch ball	11/29/2024 10:38 PM
7	4th of July	11/28/2024 2:42 PM
8	Softball	11/26/2024 7:04 PM
9	Baseball	11/26/2024 2:35 PM
10	Softball	11/25/2024 8:21 PM
11	Baseball	11/25/2024 3:06 PM
12	Yoga, walking dog at park	11/24/2024 12:57 PM
13	Take granddaughter to playground	11/24/2024 11:04 AM
14	Fund raiser	11/24/2024 9:20 AM
15	Monthly dinner at the community center	11/24/2024 6:29 AM
16	4th of July family day	11/24/2024 6:27 AM
17	Flag football, Spring Baseball	11/23/2024 7:28 PM

18	Use of both parks	11/23/2024 1:32 PM
19	4th of July	11/23/2024 1:26 PM
20	4th of July parade	11/23/2024 11:43 AM
21	Park	11/23/2024 11:16 AM
22	Little League baseball	11/23/2024 11:05 AM
23	Softball	11/22/2024 7:20 PM
24	Senior Yoga	11/22/2024 6:25 PM
25	Tee ball	11/22/2024 4:57 PM
26	JCLL	11/22/2024 3:53 PM
27	Flag Football (but got combined with i9 sports)	11/22/2024 3:23 PM
28	Community gathering, Easter	11/22/2024 1:39 PM
29	JcII fall baseball; jcII spring baseball	11/22/2024 12:30 PM
30	Summer Popsicles in the Park, 4th family fun day	11/19/2024 9:22 PM
31	Community center, truck or treat, park, soccer field	11/18/2024 10:24 AM
32	Castleberry rd and Archerlodge community	11/17/2024 11:02 AM
33	JcII	11/16/2024 8:29 AM
34	All events	11/15/2024 2:32 PM
35	Storytime at the park	11/15/2024 8:17 AM
36	Archer Lodge Town Park	11/14/2024 11:49 PM
37	Baseball	11/13/2024 8:01 PM
38	Art and stem camp if they count	11/8/2024 3:32 PM
39	Soccer and baseball	11/6/2024 10:19 PM
40	Soccer, softball	11/6/2024 8:30 PM
41	NRFA	11/6/2024 7:58 PM
42	Grand opening of park on Castleberry	11/6/2024 9:50 AM
43	Baseball, flag football , soccer	11/6/2024 7:06 AM
44	JCLL and Tar Heel League baseball	11/5/2024 9:24 PM
45	Neuse River Futbol Alliance	11/5/2024 3:55 PM
46	Soccer	11/5/2024 3:25 PM
47	Soccer softball	11/5/2024 10:41 AM
48	Soccer	11/5/2024 10:36 AM
49	Softball	11/5/2024 10:30 AM
50	NRFA Soccer	11/5/2024 10:29 AM
51	softball/vollyball	11/5/2024 10:22 AM
52	Soccer	11/5/2024 10:04 AM
53	Little league, T-Ball, NRFC, summer camps	11/5/2024 10:02 AM
54	NRFA	11/5/2024 9:57 AM
55	Soccer	11/5/2024 9:56 AM

56	Baseball, soccer	11/5/2024 9:52 AM
57	Soccer/softball	11/5/2024 9:50 AM
58	Easter, Christmas , soccer	11/5/2024 9:22 AM
59	Softball	11/5/2024 9:20 AM
60	NRFA	11/5/2024 9:15 AM
61	NRFA & JCLL	11/5/2024 9:14 AM
62	Jo Co Little League	11/4/2024 8:42 PM
63	Softball	11/4/2024 7:24 PM
64	Boys scouts, NRFA	11/4/2024 5:02 PM
65	Baseball and softball	11/3/2024 9:25 PM
66	Little Miss Archer Lodge	11/3/2024 7:24 PM
67	xmas day parade, 4th of july celebration	11/3/2024 1:04 PM
68	Baseball	11/1/2024 11:41 PM
69	Use of park on Castleberry	11/1/2024 1:38 PM
70	V-ball	11/1/2024 10:05 AM
71	Softball and basketball clinic, various community events	11/1/2024 9:51 AM
72	Baseball	10/31/2024 2:54 PM
73	Cross Country events	10/31/2024 2:39 PM
74	Summer camps	10/31/2024 1:28 PM
75	Ones with food trucks and last one was in October.	10/31/2024 1:20 PM
76	Tball	10/31/2024 1:13 PM

Q2 How often do you and your family visit a park or trail?

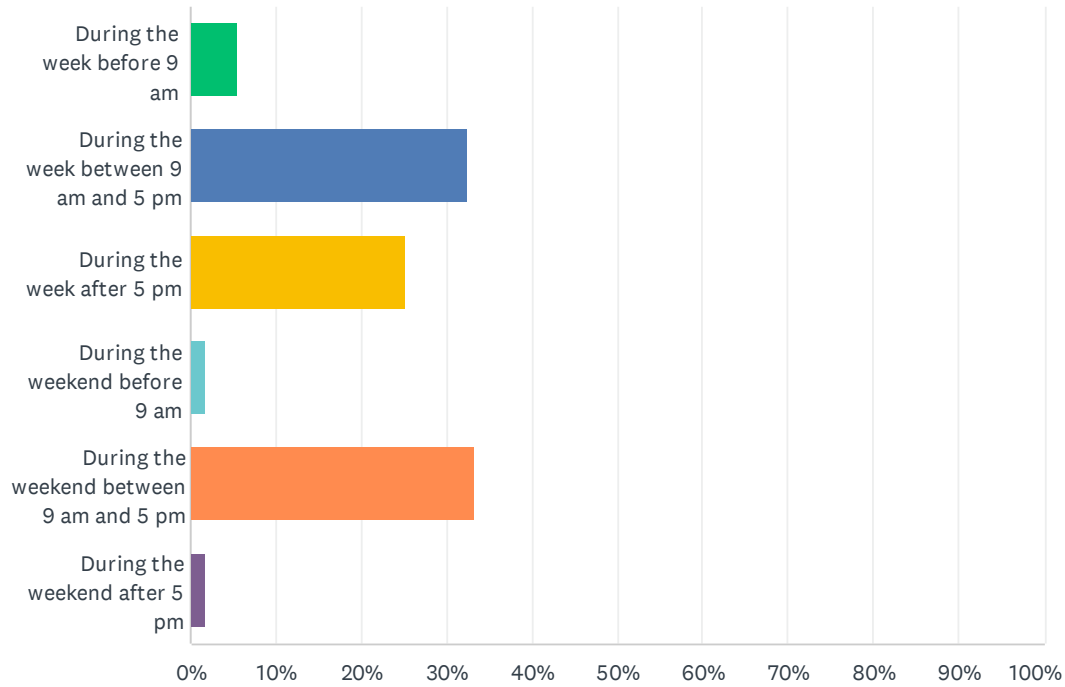
Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES	
Every day	3.90%	9
2 or more times per week	27.27%	63
2 or more times per month	28.14%	65
A few times per year	23.81%	55
Rarely	10.39%	24
Never	6.49%	15
TOTAL		231

Q3 What times of the day would you be most likely to use a park or trail facility?

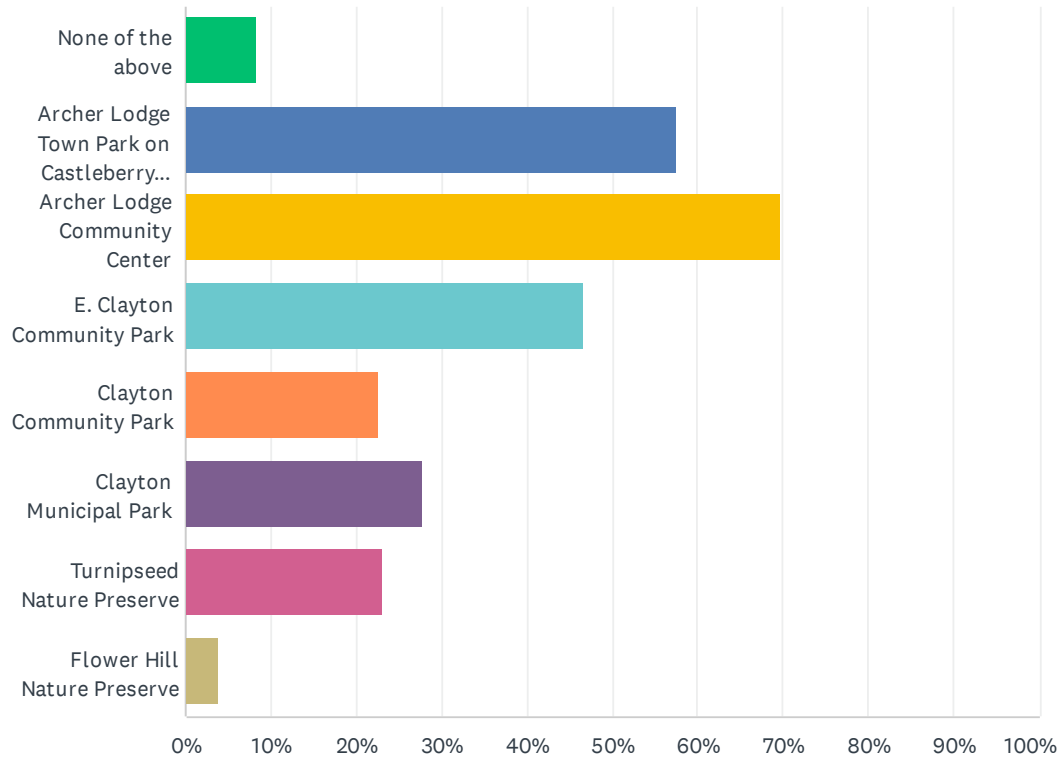
Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES	
During the week before 9 am	5.63%	13
During the week between 9 am and 5 pm	32.47%	75
During the week after 5 pm	25.11%	58
During the weekend before 9 am	1.73%	4
During the weekend between 9 am and 5 pm	33.33%	77
During the weekend after 5 pm	1.73%	4
TOTAL		231

Q4 Please indicate which parks and trails and community facilities you have visited over the past year. Select all that apply.

Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES	
None of the above	8.23%	19
Archer Lodge Town Park on Castleberry Road	57.58%	133
Archer Lodge Community Center	69.70%	161
E. Clayton Community Park	46.75%	108
Clayton Community Park	22.51%	52
Clayton Municipal Park	27.71%	64
Turnipseed Nature Preserve	22.94%	53
Flower Hill Nature Preserve	3.90%	9
Total Respondents: 231		

Q5 What other municipal parks/facilities, schools, health clubs, places of worship, or other organizations do you use for recreation?

Answered: 189 Skipped: 42

#	RESPONSES	DATE
1	Health quest	12/18/2024 2:56 PM
2	.	12/17/2024 9:22 PM
3	Durant nature park Raven Rock park Umstead Bailey Williamson Preserve	12/16/2024 4:38 PM
4	We use the Neuse River trail almost every day. Archer Lodge offers nothing.	12/16/2024 7:31 AM
5	Clayton crossings open gym, Clyde's chapel playground, Knightdale station park, Sassafrass playground,	12/12/2024 2:28 PM
6	None	12/11/2024 11:47 AM
7	None	12/11/2024 11:01 AM
8	Neuse River Trail, Swift Creek Bluff	12/10/2024 3:07 PM
9	None	12/9/2024 11:05 PM
10	Knightdale Station, Direction Volleyball, NCRA Soccer	12/9/2024 12:52 PM
11	My backyard	12/5/2024 10:14 AM
12	Knightdale pickleball courts	12/4/2024 12:43 PM
13	Baseball parks	12/2/2024 8:39 PM
14	High school Church	12/2/2024 6:52 AM
15	Na	12/1/2024 5:23 PM
16	Riverwood Elementary School playground, River Dell Elementary School playground	12/1/2024 12:05 PM
17	Clayton Center on Amelia. Riverwood Athletic Club.	12/1/2024 11:12 AM
18	Raleigh Parks and Recreation	12/1/2024 9:07 AM
19	Fit for life	12/1/2024 7:23 AM
20	ALMS, CHHS	11/30/2024 7:55 PM
21	YMCA	11/30/2024 2:58 PM
22	Health clubs	11/29/2024 10:38 PM
23	Trails in the Outer Banks.	11/29/2024 6:36 PM
24	Soccer fields for pickup games. Mostly in Raleigh due to fields in use by kids leagues whenever I'm looking to play.	11/29/2024 2:30 PM
25	Flowers Farmers Market	11/29/2024 1:19 PM
26	The Light church-everything just abo YMCA- to workout Archer lodge park- to get away and relax, too work from home!	11/29/2024 7:20 AM
27	I walk Mountains to sea trails and other trails.	11/28/2024 11:34 AM
28	Knightdale dog park	11/27/2024 8:05 PM
29	Nuese river trail, clemmons state park	11/27/2024 7:25 PM
30	N/a	11/27/2024 11:09 AM

31	YMCA	11/27/2024 9:12 AM
32	We use the YMCA and go to Everett's Chapel Church. Our children go to JCC, CHHS, and Southside Christian.	11/27/2024 1:58 AM
33	Wake Forest Ice Hockey Rink, Garner Hockey, Raleigh Ice Hockey	11/26/2024 8:06 PM
34	Church	11/26/2024 7:05 PM
35	Na	11/26/2024 7:04 PM
36	East triangle YMCA, small playground at Flowers neighbourhood	11/26/2024 6:32 PM
37	YMCA	11/26/2024 5:08 PM
38	Idk	11/26/2024 2:35 PM
39	Neuse River walking trails	11/26/2024 1:01 PM
40	None	11/26/2024 7:15 AM
41	Clemons State Park	11/25/2024 9:18 PM
42	Wendell community center	11/25/2024 8:21 PM
43	Clayton	11/25/2024 3:03 PM
44	NONE	11/25/2024 12:53 PM
45	Clemmons Educational Forest	11/25/2024 9:20 AM
46	None	11/25/2024 8:08 AM
47	None	11/25/2024 7:29 AM
48	Church fellowship hall	11/24/2024 9:12 PM
49	Knightdale Town Park	11/24/2024 8:58 PM
50	Knightdale Station Park	11/24/2024 6:51 PM
51	Riverwood Athletic Center	11/24/2024 1:25 PM
52	Wake Forest Lake	11/24/2024 12:57 PM
53	Just the pales and the community center and holiday parades and festivals	11/24/2024 11:04 AM
54	Knightdale station	11/24/2024 9:20 AM
55	Rich's gym	11/24/2024 6:29 AM
56	Clayton Fitness	11/24/2024 6:27 AM
57	none	11/24/2024 4:33 AM
58	Knightdale station park	11/23/2024 8:44 PM
59	Clayton Middle, Cooper Elementary, Apex skate park	11/23/2024 7:28 PM
60	Durham County Wildlife Club, Bass Lake (Holly Springs), Clayton (Greenway) Bike Path	11/23/2024 7:07 PM
61	Privately owned pine forest	11/23/2024 6:38 PM
62	Nurse river greenway trail	11/23/2024 5:44 PM
63	Zebulon park	11/23/2024 5:29 PM
64	Riverwood Athletic Club	11/23/2024 4:46 PM
65	None	11/23/2024 4:05 PM
66	Greenway	11/23/2024 2:14 PM
67	Castleberry Park	11/23/2024 1:52 PM
68	Pullen park	11/23/2024 1:32 PM

69	Riverwood health club, Clemons forest, Neuse River greenway,	11/23/2024 1:26 PM
70	Any State Park or Nature Preserve	11/23/2024 12:21 PM
71	Wilson Lake	11/23/2024 11:51 AM
72	Neuse walk way in Clayton	11/23/2024 11:43 AM
73	City of Raleigh	11/23/2024 11:16 AM
74	.	11/23/2024 11:05 AM
75	Neuse river trail	11/23/2024 10:26 AM
76	Neuse River Trail	11/23/2024 10:22 AM
77	Na	11/23/2024 10:00 AM
78	SRAC in Smithfield Neuse River Trail	11/23/2024 9:25 AM
79	None	11/23/2024 7:26 AM
80	Riverwood Golf and Athletic Club	11/23/2024 7:14 AM
81	Nuese walking trail	11/23/2024 5:03 AM
82	YMCA	11/22/2024 10:31 PM
83	None	11/22/2024 8:25 PM
84	St. Ann Catholic Church in Clayton, Wendell Country Club, Riverwood Golf, Reedy Creek Golf, Pine Hollow Golf.	11/22/2024 7:20 PM
85	YMCA	11/22/2024 7:20 PM
86	None	11/22/2024 6:41 PM
87	Gym, church	11/22/2024 6:30 PM
88	Wendell Recreation center, Bethlehem, Clayton Parks and Rec, Fred smith Co gym/pool	11/22/2024 6:27 PM
89	River walk	11/22/2024 6:25 PM
90	None	11/22/2024 5:54 PM
91	Na	11/22/2024 5:37 PM
92	Clemmons Forest, Williamson Preserve, East Clayton Dog Park	11/22/2024 5:21 PM
93	Corinth holder tennis courts	11/22/2024 5:19 PM
94	YMCA greenway	11/22/2024 5:14 PM
95	None	11/22/2024 5:08 PM
96	YMCA	11/22/2024 4:57 PM
97	YMCA Clayton, Clayton Global Methodist Church	11/22/2024 4:53 PM
98	Clayton Civitan Pleasant Park Apex Seymour Park Apex	11/22/2024 4:22 PM
99	Prefer not to answer	11/22/2024 3:39 PM
100	Nuese River Trail, Knightdale Station Park	11/22/2024 3:23 PM
101	Bethlehem baptist, knightdale	11/22/2024 2:45 PM
102	Clayton city park Smithfield Aquatic Center Wendell park Knightdale park Neuse River walkway	11/22/2024 2:09 PM
103	White Oak church, Riverwood elementary, Knightdale and Wendell parks	11/22/2024 1:39 PM
104	Troop and pack 421. Clayton Community Center	11/22/2024 12:30 PM
105	Town of Wendell and Knightdale	11/21/2024 12:27 PM

106	YMCA, clayton community center, River Dell elementary	11/19/2024 9:22 PM
107	White oak Baptist church, Riverwood elementary, Knightdale station, Wendell park(both of these to play disc golf because archer lodge doesn't have a course	11/18/2024 10:24 AM
108	none	11/18/2024 8:21 AM
109	Knightdale	11/17/2024 11:02 AM
110	All the lakes around the triangle area and did go to Clemmons Educational State Park.	11/15/2024 5:30 PM
111	Flowers Plantation trails	11/15/2024 4:05 PM
112	None	11/15/2024 12:59 PM
113	None	11/15/2024 11:34 AM
114	Cross country runs all over your various trails. My daughter is in their team	11/15/2024 9:12 AM
115	We use parks and trails in the surrounding Wendell, Zebulon, Wilson Mills and Smithfield area.	11/15/2024 8:17 AM
116	None	11/15/2024 7:15 AM
117	Neuse river trail	11/15/2024 6:04 AM
118	Wendell Town Park	11/14/2024 11:49 PM
119	None	11/14/2024 11:10 PM
120	None of the above	11/14/2024 8:11 PM
121	none	11/14/2024 8:11 PM
122	White oak	11/13/2024 8:01 PM
123	Boy scouts at White Oak Baptist Church, Smithfield Recreation & Aquatics	11/12/2024 6:14 PM
124	Robertson Millpond Preserve, Neuse River Greenway, Knightdale Station	11/12/2024 5:38 PM
125	Clayton River Walk Sam's Branch Greenway Clayton Visual Arts organization	11/11/2024 3:44 PM
126	Knightdale Station Park and Playground, Raleigh parks, Wake County Parks, Clemmons State Educational Forest	11/10/2024 1:50 PM
127	Knightdale Station Park East Triangle YMCA	11/10/2024 1:36 PM
128	NRFA, ymca	11/8/2024 3:32 PM
129	Town of Clayton, Town of Wendell, Town of Zebulon	11/7/2024 9:08 AM
130	None	11/7/2024 7:09 AM
131	We use NRFA, Johnston County Little League and I9 Sports	11/6/2024 10:19 PM
132	Knightdale, cause the local fields are full/used.	11/6/2024 8:30 PM
133	Na	11/6/2024 8:06 PM
134	Church at Clayton Crossings	11/6/2024 7:58 PM
135	Walk way in Clayton on Neuse river, faregame arcade, blvd west.	11/6/2024 9:50 AM
136	Clayton middle school for flag football and baseball	11/6/2024 7:06 AM
137	Na	11/5/2024 9:24 PM
138	None in Archer Lodge/Clayton. Falls Lake trails. Neuse River Trail. WRAL in Raleigh. RISE Charter School soccer fields.	11/5/2024 8:32 PM
139	None	11/5/2024 3:55 PM
140	Civitan in Clayton	11/5/2024 3:48 PM
141	Archer lodge middle	11/5/2024 3:25 PM

142	NRFA, GCAA, Clemmons Educational State Park, Knightdale Station Park,	11/5/2024 12:58 PM
143	Neuse River Futbol Alliance	11/5/2024 12:40 PM
144	None	11/5/2024 12:11 PM
145	Smithfield Recreation and Aquatics Center GCAA Fields Wilson's Mills Playground	11/5/2024 11:24 AM
146	Clemmons Educational forest, YMCA, Home UMC, Corinth Holders HS, ALMS	11/5/2024 11:20 AM
147	Clayton parks	11/5/2024 10:41 AM
148	YMCA	11/5/2024 10:36 AM
149	Johnston Aquatic Center	11/5/2024 10:30 AM
150	Knightdale Station	11/5/2024 10:29 AM
151	Clayton Parks and recreation Neuse River Futbol Alliance	11/5/2024 10:29 AM
152	Central Baptist church. Cross Assembly on Yonkers rd.	11/5/2024 10:27 AM
153	n.a	11/5/2024 10:22 AM
154	None	11/5/2024 10:04 AM
155	Healthquest, YMCA, SRAC, Neuse River Trail, Golf	11/5/2024 10:02 AM
156	Triangle Aquatic Center	11/5/2024 9:57 AM
157	SRAC, YMCA	11/5/2024 9:56 AM
158	Town of Clayton	11/5/2024 9:54 AM
159	n/a	11/5/2024 9:52 AM
160	Ymca	11/5/2024 9:50 AM
161	Alligator Steps, NRFA, wake county parks	11/5/2024 9:37 AM
162	None	11/5/2024 9:31 AM
163	Neuse river trail	11/5/2024 9:20 AM
164	State Parks	11/5/2024 9:18 AM
165	Ma	11/5/2024 9:16 AM
166	N/A	11/5/2024 9:15 AM
167	Archer Lodge Middle School	11/4/2024 10:16 PM
168	None	11/4/2024 7:24 PM
169	White Oak Baptist Church	11/4/2024 5:02 PM
170	None	11/4/2024 4:19 PM
171	None	11/3/2024 9:25 PM
172	Archer Lodge Middle River Dell Elementary	11/3/2024 7:24 PM
173	East Triangle YMCA, Historic Yates Mill Park	11/3/2024 2:51 PM
174	Williamson preserve	11/3/2024 1:22 PM
175	none	11/3/2024 1:04 PM
176	Alligator swim school	11/2/2024 9:36 PM
177	Clemmons Lake benson White deer	11/2/2024 12:22 AM
178	Clayton rec, Clayton river walk	11/1/2024 10:16 PM
179	Williamson preserve, Greenway, YMCA	11/1/2024 1:38 PM

180	Riverwood Middle School	11/1/2024 9:51 AM
181	None	11/1/2024 9:46 AM
182	None	11/1/2024 9:21 AM
183	N/a	10/31/2024 2:54 PM
184	None	10/31/2024 2:39 PM
185	Knightdale Station Park, Harper Park, Clyde's Chapel	10/31/2024 2:37 PM
186	We go to a few in Raleigh	10/31/2024 1:59 PM
187	Knightdale station park NcMP Henderson Triangle rock climb Williamson preserve Riverwood pool	10/31/2024 1:28 PM
188	East triangle YMCA	10/31/2024 1:13 PM
189	None	10/31/2024 1:08 PM

Q6 Which park or recreational facility is closest to your home?

Answered: 220 Skipped: 11

#	RESPONSES	DATE
1	Archer Lodge community center	12/18/2024 2:56 PM
2	Archer Lodge Community Park	12/17/2024 9:22 PM
3	Turnipseed	12/16/2024 4:38 PM
4	Neuse River Trail	12/16/2024 7:31 AM
5	Archer lodge community center playground	12/12/2024 2:28 PM
6	Archer Lodge	12/11/2024 11:47 AM
7	AL Ballfield	12/11/2024 11:01 AM
8	Castleberry Road	12/11/2024 7:21 AM
9	Archer Lodge Park	12/10/2024 3:07 PM
10	Archer lidge	12/9/2024 11:05 PM
11	AL Town Park on Castleberry	12/9/2024 12:52 PM
12	Archer lodge park	12/8/2024 2:52 PM
13	Archers Lodge but a small distance longer to E. Clayton with no additional taxes.	12/5/2024 10:14 AM
14	Archer Lodge Town Park on Castleberry	12/4/2024 7:01 PM
15	All	12/4/2024 12:43 PM
16	Castleberry	12/2/2024 8:39 PM
17	Archer lodge community park	12/2/2024 6:52 AM
18	Archer Lodge Community Park	12/1/2024 5:23 PM
19	Archer Lodge	12/1/2024 4:14 PM
20	Archer Lodge Town Park	12/1/2024 12:05 PM
21	Archer Lodge Community Center	12/1/2024 11:12 AM
22	Archer Lodge Community Center and AL Town Park on Castleberry.	12/1/2024 9:07 AM
23	Unknown	12/1/2024 7:23 AM
24	AL Community Center	11/30/2024 7:55 PM
25	Archer lodge community	11/30/2024 2:58 PM
26	Archer Lodge Community	11/29/2024 10:38 PM
27	Archer Lodge Community Center	11/29/2024 6:36 PM
28	Archer lodge community center	11/29/2024 2:30 PM
29	Archer Lodge Town Park	11/29/2024 1:19 PM
30	Archer lodge park	11/29/2024 7:20 AM
31	Archer Lodge	11/28/2024 2:42 PM
32	Castlebury and Turnipseed	11/28/2024 11:34 AM
33	Archer Lodge Community Center	11/28/2024 9:51 AM

34	Archer Lodge Community Center	11/27/2024 8:11 PM
35	Archer lodge community center	11/27/2024 8:05 PM
36	Community center and park	11/27/2024 7:25 PM
37	Archer Lodge	11/27/2024 11:18 AM
38	Archer lodge	11/27/2024 11:09 AM
39	Archer Lodge Community Center	11/27/2024 9:12 AM
40	The new park on castleberry rd.	11/27/2024 1:58 AM
41	Castleberry	11/26/2024 8:06 PM
42	Archer Lodge Community Center	11/26/2024 7:05 PM
43	Archer lodge town park	11/26/2024 7:04 PM
44	East triangle Ymca	11/26/2024 6:32 PM
45	The new one on Canterbury	11/26/2024 5:08 PM
46	Archer Lodge Community Center	11/26/2024 3:35 PM
47	East Clayton park	11/26/2024 3:11 PM
48	Community center	11/26/2024 2:35 PM
49	Neuse River trail off Covered Bridge Rd	11/26/2024 1:01 PM
50	I don't know	11/26/2024 7:15 AM
51	Archer Lodge community	11/25/2024 9:18 PM
52	Town park on castleberry	11/25/2024 8:21 PM
53	Archer Lodge Community Center	11/25/2024 3:06 PM
54	Archer lodge	11/25/2024 3:03 PM
55	ARCHER LODGE COMMUNITY CENTER	11/25/2024 12:53 PM
56	Archer Lodge Community Center	11/25/2024 9:20 AM
57	Unsure	11/25/2024 8:08 AM
58	Archer lodge park (castleberry)	11/25/2024 7:29 AM
59	Archer Lodge community center	11/24/2024 9:12 PM
60	Archer lodge Park/Rec field	11/24/2024 8:58 PM
61	Archer Lodge main community center	11/24/2024 6:51 PM
62	Turnipseed	11/24/2024 1:25 PM
63	Archer Lodge	11/24/2024 12:57 PM
64	Community center	11/24/2024 11:04 AM
65	Turnipseed nature preserve	11/24/2024 9:20 AM
66	Archer Lodge	11/24/2024 6:29 AM
67	Archer lodge park on Castleberry	11/24/2024 6:27 AM
68	The baseball field	11/24/2024 4:33 AM
69	East Clayton Community	11/23/2024 8:44 PM
70	Archer Lodge Community Center	11/23/2024 7:28 PM
71	Don't know	11/23/2024 7:07 PM

72	New Town Park on Castleberry, and old park at ArLo community center are the same distance	11/23/2024 6:38 PM
73	Archers Lodge Community Center	11/23/2024 5:44 PM
74	Archer Lodge	11/23/2024 5:29 PM
75	Archer Lodge Community Park	11/23/2024 4:46 PM
76	Not sure	11/23/2024 4:05 PM
77	Community Center	11/23/2024 2:14 PM
78	Castleberry Park	11/23/2024 1:52 PM
79	Castleberry	11/23/2024 1:32 PM
80	Riverwood	11/23/2024 1:26 PM
81	Tunipseed Nature Preserve	11/23/2024 12:21 PM
82	Archer Lodge park	11/23/2024 11:51 AM
83	Archer lodge community center	11/23/2024 11:43 AM
84	Wendell	11/23/2024 11:16 AM
85	Castleberry	11/23/2024 11:05 AM
86	Archer Lodge Community Park	11/23/2024 10:26 AM
87	Archer Lodge Town Park	11/23/2024 10:22 AM
88	Riverwalk on Covered Bridge Road	11/23/2024 10:10 AM
89	Archer Lodge	11/23/2024 10:00 AM
90	Archer Lodge Community Center	11/23/2024 9:25 AM
91	Archer Lodge Community Center	11/23/2024 7:26 AM
92	Archer Lodge	11/23/2024 7:14 AM
93	Archer Lodge municipal park	11/23/2024 5:03 AM
94	Archer Lodge community center and the archer lodge new baseball fields and park.	11/22/2024 10:31 PM
95	Archer lodge community & castleberry Rd.	11/22/2024 8:25 PM
96	Archer Lodge Community Center	11/22/2024 7:20 PM
97	Archer lodge parks (both)	11/22/2024 7:20 PM
98	Archer lodge community	11/22/2024 7:16 PM
99	AL community center	11/22/2024 6:41 PM
100	Community center	11/22/2024 6:30 PM
101	Fred Smith Recreation, Green way trail	11/22/2024 6:27 PM
102	Archer Lodge Parks	11/22/2024 6:25 PM
103	The AL community Center	11/22/2024 5:54 PM
104	Community center	11/22/2024 5:53 PM
105	Archer lodge community center	11/22/2024 5:37 PM
106	Williamson Preserve	11/22/2024 5:21 PM
107	Archer Lodge	11/22/2024 5:19 PM
108	Green way & castleberry park	11/22/2024 5:14 PM
109	Not sure	11/22/2024 5:08 PM

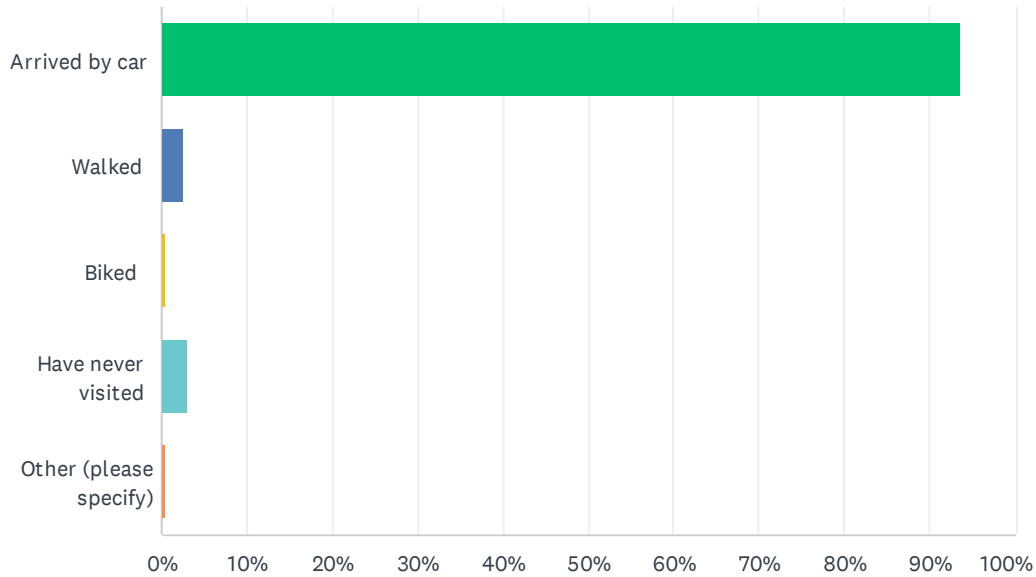
110	Castleberry Park	11/22/2024 4:57 PM
111	archer lodge	11/22/2024 4:53 PM
112	Archer lodge park	11/22/2024 4:45 PM
113	Community Center	11/22/2024 4:22 PM
114	Castleberry	11/22/2024 4:21 PM
115	Archer Lodge Park, Greenways	11/22/2024 3:53 PM
116	Archer Lodge Community Center	11/22/2024 3:39 PM
117	Archer Lodge Community Building Park and the New Archer Lodge Park on Castleberry are about the same distance	11/22/2024 3:23 PM
118	New park on castleberry	11/22/2024 2:45 PM
119	Archer Lodge town park Castleberry Road	11/22/2024 2:09 PM
120	Archer lodge community center	11/22/2024 1:39 PM
121	Archer lodge town park	11/22/2024 12:30 PM
122	Archer Lodge Park on Castleberry	11/19/2024 9:22 PM
123	Archer Lodge community center	11/18/2024 10:24 AM
124	Castleberry rd.	11/18/2024 8:21 AM
125	Archerlodge community center	11/17/2024 11:02 AM
126	Archer Lodge Community center	11/16/2024 8:29 AM
127	Live in Flowers Plantation - all I know is the Greenway and Clemmons.	11/15/2024 5:30 PM
128	Archer Lodge community park	11/15/2024 4:05 PM
129	Archer Lodge Park (Castleberry)	11/15/2024 12:59 PM
130	Castleberry rd.	11/15/2024 11:34 AM
131	AL community	11/15/2024 9:12 AM
132	Archer lodge community center park and Wendell downtown park	11/15/2024 8:17 AM
133	Turnipseed	11/15/2024 7:15 AM
134	Archer lodge park	11/15/2024 6:04 AM
135	Archer Lodge Town Park	11/14/2024 11:49 PM
136	Archer Lodge	11/14/2024 11:10 PM
137	Castleberry rd.	11/14/2024 8:11 PM
138	Town park on Castleberry Rd	11/14/2024 8:11 PM
139	Archer Lodge	11/14/2024 8:53 AM
140	Alcc	11/13/2024 8:01 PM
141	Archer Lodge Community Center	11/12/2024 6:14 PM
142	Archer Lodge Town Park	11/12/2024 5:38 PM
143	Archer Lodge Community Center	11/11/2024 3:44 PM
144	Knightdale Station Park	11/10/2024 1:50 PM
145	YMCA	11/10/2024 1:36 PM
146	Archer lodge park	11/8/2024 3:32 PM
147	Archer Lodge Community Center	11/7/2024 9:08 AM

148	East Clayton Community Park	11/7/2024 7:09 AM
149	Castleberry	11/6/2024 10:19 PM
150	AL Community	11/6/2024 8:30 PM
151	Archer lodge community center	11/6/2024 8:06 PM
152	East Clayton Community	11/6/2024 7:58 PM
153	Archer lodge downtown	11/6/2024 9:50 AM
154	Archer lodge park on Castleberry	11/6/2024 7:06 AM
155	ALCC	11/5/2024 9:24 PM
156	Archer Lodge Community Center	11/5/2024 8:32 PM
157	East Clayton community	11/5/2024 4:50 PM
158	Archer lodge park	11/5/2024 3:55 PM
159	Archer Lodge Comm Center	11/5/2024 3:48 PM
160	Archer lodge middle	11/5/2024 3:25 PM
161	Archer Lodge Community Center	11/5/2024 12:58 PM
162	Archer Lodge Community Park	11/5/2024 12:40 PM
163	Archer Lodge	11/5/2024 12:11 PM
164	Archer lodge park on castleberry	11/5/2024 11:53 AM
165	East Clayton Community Park	11/5/2024 11:24 AM
166	YMCA, AL Community center	11/5/2024 11:20 AM
167	Archer lodge park castleberry	11/5/2024 10:41 AM
168	Community Center	11/5/2024 10:36 AM
169	Archer Lodge Community Center Park.	11/5/2024 10:30 AM
170	Knightdale Station, Harper Park, E. Clayton	11/5/2024 10:29 AM
171	Castleberry road fields	11/5/2024 10:29 AM
172	Archer Lodge Community Center	11/5/2024 10:27 AM
173	archer lodge community park	11/5/2024 10:22 AM
174	Clayton municipal	11/5/2024 10:04 AM
175	E Clayton	11/5/2024 10:02 AM
176	East Clayton Community Park	11/5/2024 9:57 AM
177	YMCA	11/5/2024 9:56 AM
178	Clayton community park	11/5/2024 9:54 AM
179	E. Clayton Park and Archer Lodge Community center	11/5/2024 9:52 AM
180	East Clayton	11/5/2024 9:50 AM
181	Archer Lodge Community Park	11/5/2024 9:37 AM
182	East Clayton Community Park	11/5/2024 9:31 AM
183	Archer lodge community center	11/5/2024 9:22 AM
184	A.L. main park	11/5/2024 9:20 AM
185	Clemons State	11/5/2024 9:18 AM

186	Archer lodge community center	11/5/2024 9:16 AM
187	East Clayton Park	11/5/2024 9:15 AM
188	ALCC	11/5/2024 9:14 AM
189	Archer lodge community center	11/4/2024 10:16 PM
190	Park Castleberry Road	11/4/2024 8:42 PM
191	Clayton park and rec	11/4/2024 7:24 PM
192	Archer Lodge Community Center	11/4/2024 5:02 PM
193	Archer lodge town hall park	11/4/2024 4:19 PM
194	Archer Lodge Community Center	11/4/2024 1:45 PM
195	Archer Lodge Community Center	11/3/2024 9:25 PM
196	Archer Lodge Community Ctr	11/3/2024 7:24 PM
197	Archer Lodge Park by the community center	11/3/2024 2:51 PM
198	Archer Lodge Park , Castleberry	11/3/2024 1:37 PM
199	Turnip seed & archer lodge community	11/3/2024 1:22 PM
200	archer lodge	11/3/2024 1:04 PM
201	The park on castleberry road	11/2/2024 9:36 PM
202	Archer lodge castleberry	11/2/2024 12:22 AM
203	ALCC	11/1/2024 11:41 PM
204	Archer lodge castleberry park, Clayton river walk, east clayton community park	11/1/2024 10:16 PM
205	Castleberry	11/1/2024 1:38 PM
206	Castleberry	11/1/2024 10:05 AM
207	Archer lodge town park castleberry	11/1/2024 9:51 AM
208	Archer Lodge Park on castleberry	11/1/2024 9:46 AM
209	Town park castleberry	11/1/2024 9:21 AM
210	E Clayton	10/31/2024 9:41 PM
211	Archer Lodge Town Park	10/31/2024 8:58 PM
212	AL community center park	10/31/2024 2:54 PM
213	AL park	10/31/2024 2:39 PM
214	archer lodge	10/31/2024 2:37 PM
215	Both Archer lodge parks	10/31/2024 1:59 PM
216	Archer Lodge Community Center	10/31/2024 1:33 PM
217	Archer lodge community center	10/31/2024 1:28 PM
218	Archer Lodge park Castleberry	10/31/2024 1:20 PM
219	Archer lodge park off castleberry	10/31/2024 1:13 PM
220	Archer Lodge Park	10/31/2024 1:08 PM

Q7 For the most recent visit by anyone in your household to any park or recreational facility, how did they get there?

Answered: 231 Skipped: 0

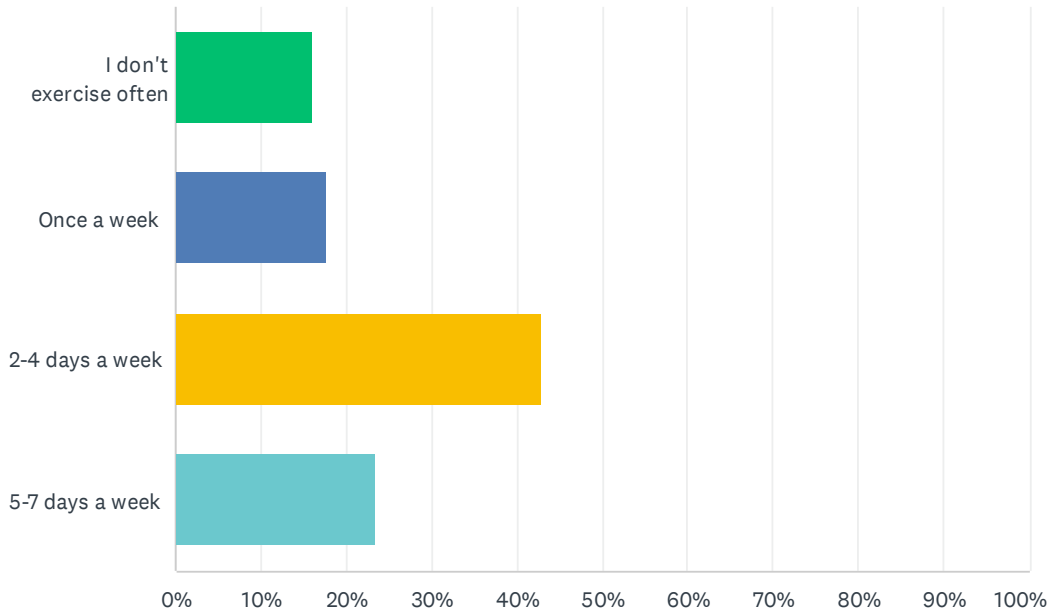


ANSWER CHOICES	RESPONSES
Arrived by car	93.51% 216
Walked	2.60% 6
Biked	0.43% 1
Have never visited	3.03% 7
Other (please specify)	0.43% 1
TOTAL	231

#	OTHER (PLEASE SPECIFY)	DATE
1	Don't use.	12/11/2024 11:01 AM

Q8 In a typical week, how many days do you exercise?

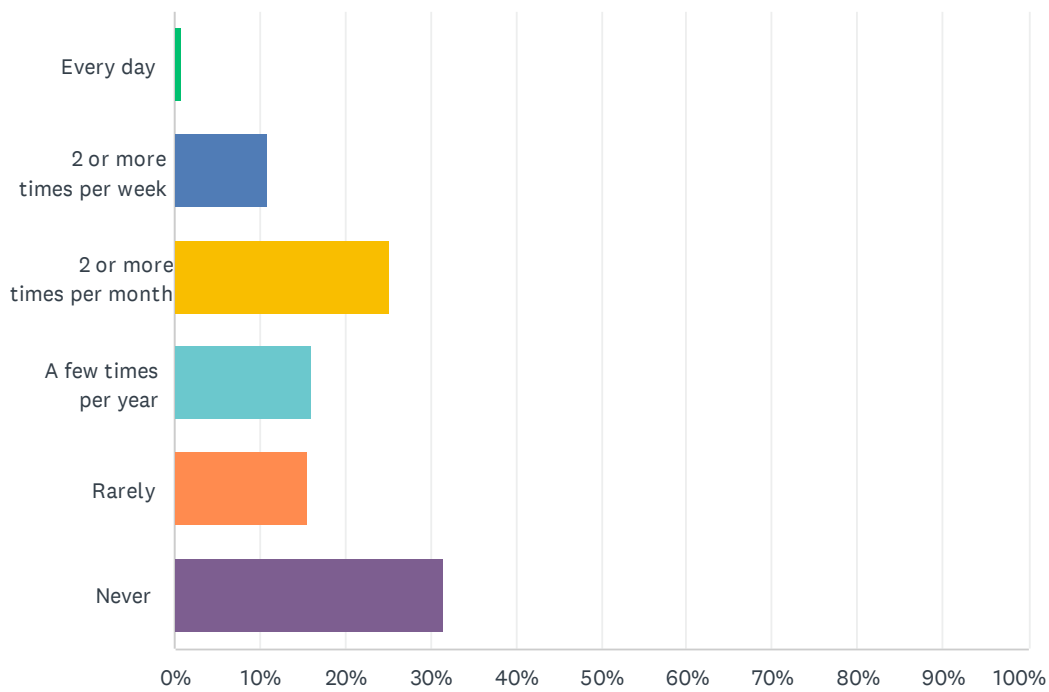
Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES
I don't exercise often	16.02% 37
Once a week	17.75% 41
2-4 days a week	42.86% 99
5-7 days a week	23.38% 54
TOTAL	231

Q9 How often do you visit Archer Lodge Town Park on Castleberry Road?

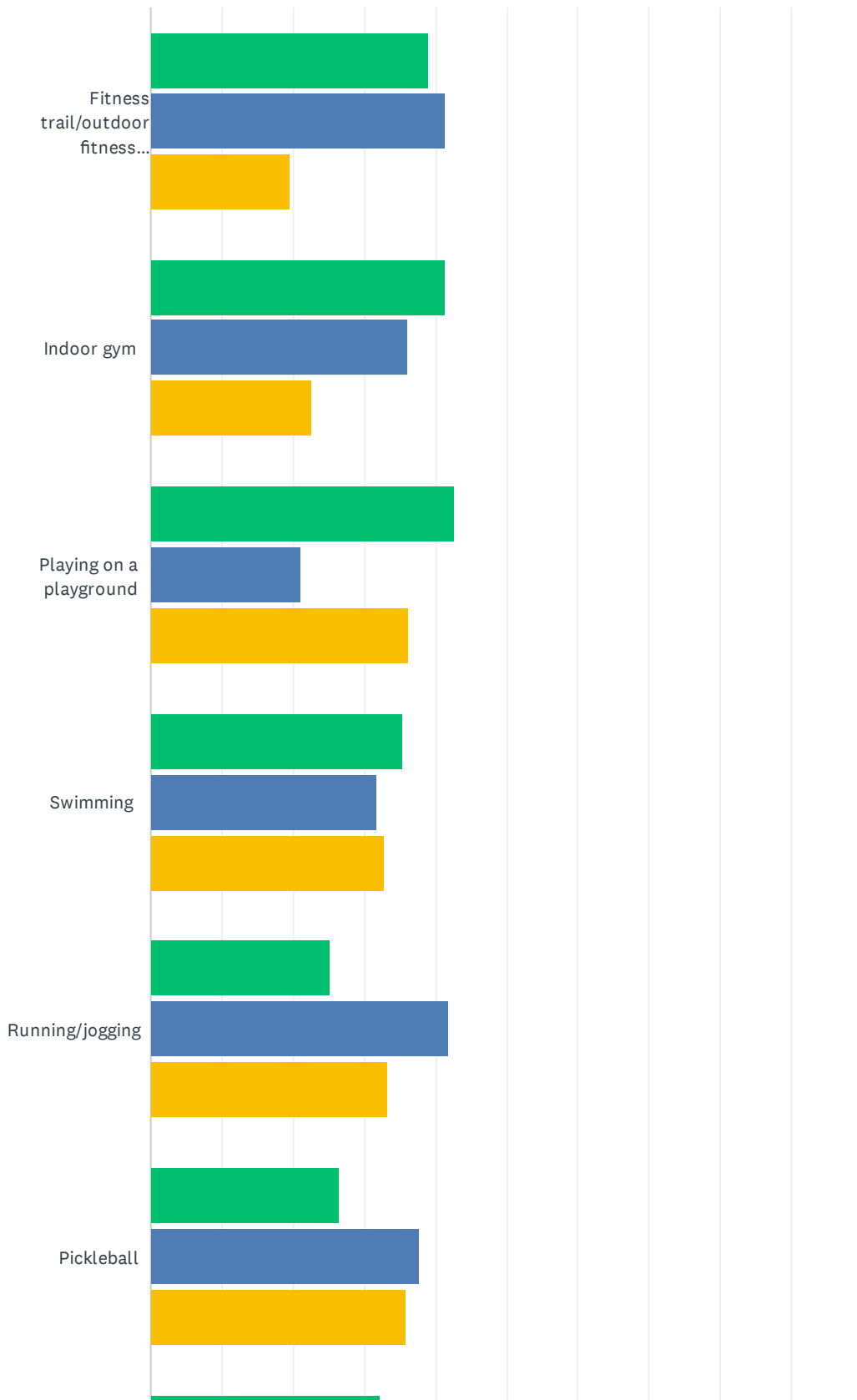
Answered: 231 Skipped: 0

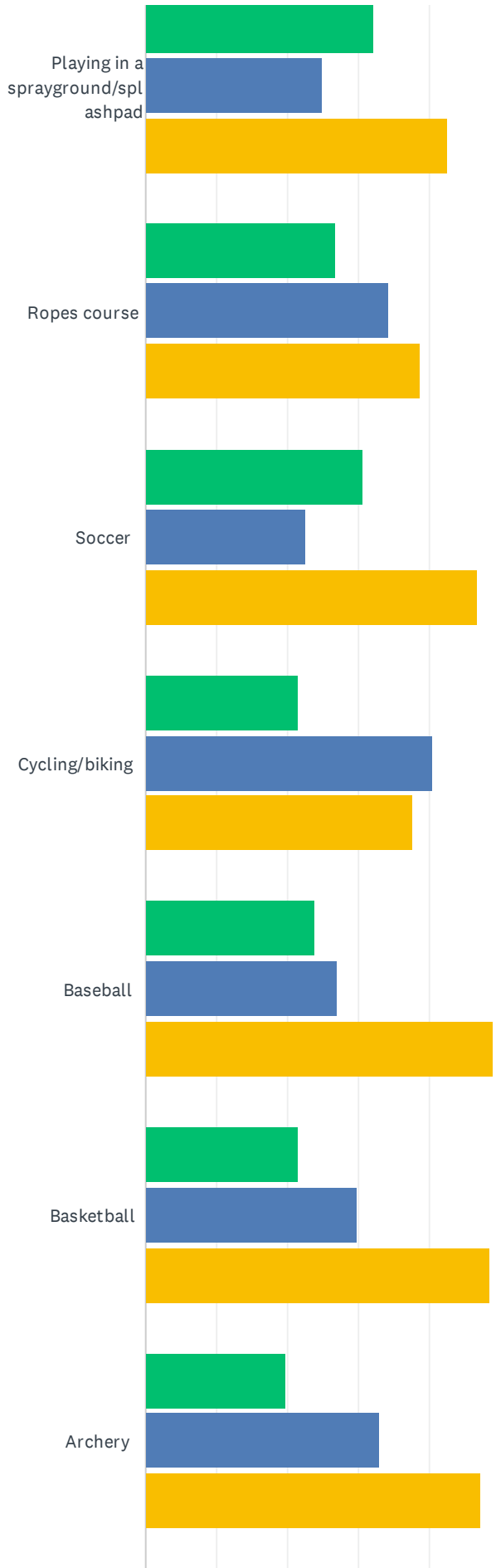


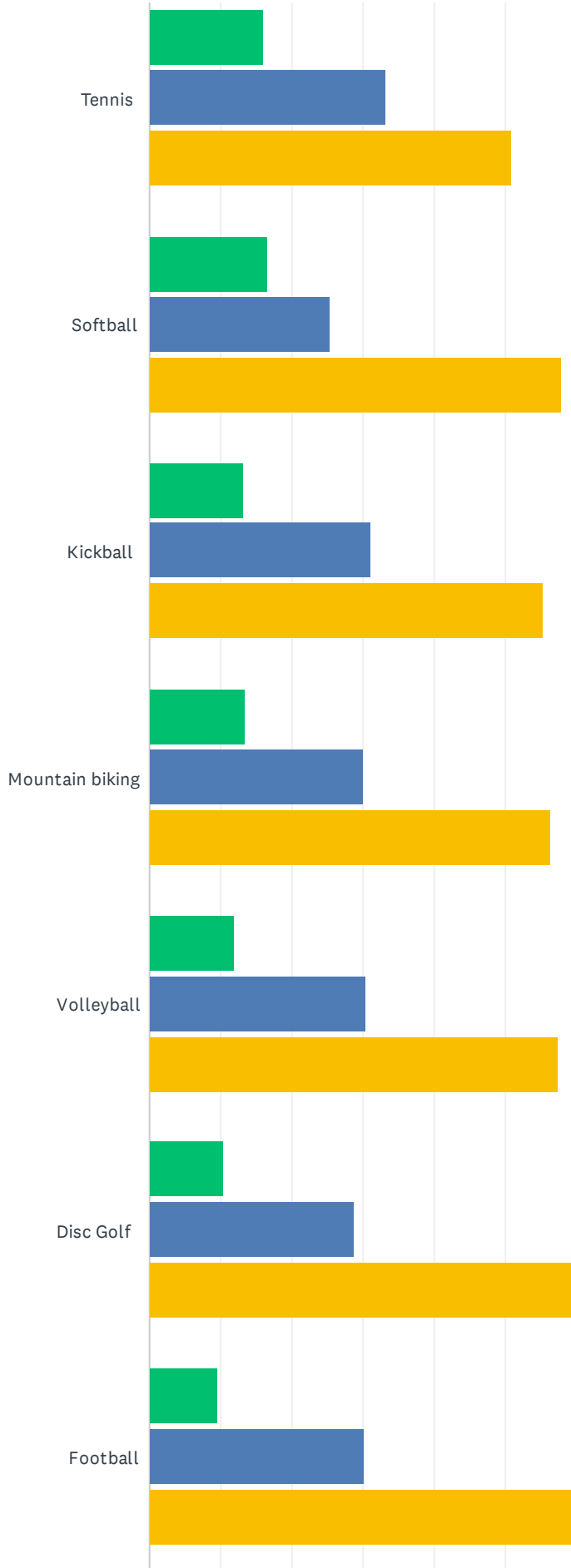
ANSWER CHOICES	RESPONSES	
Every day	0.87%	2
2 or more times per week	10.82%	25
2 or more times per month	25.11%	58
A few times per year	16.02%	37
Rarely	15.58%	36
Never	31.60%	73
TOTAL		231

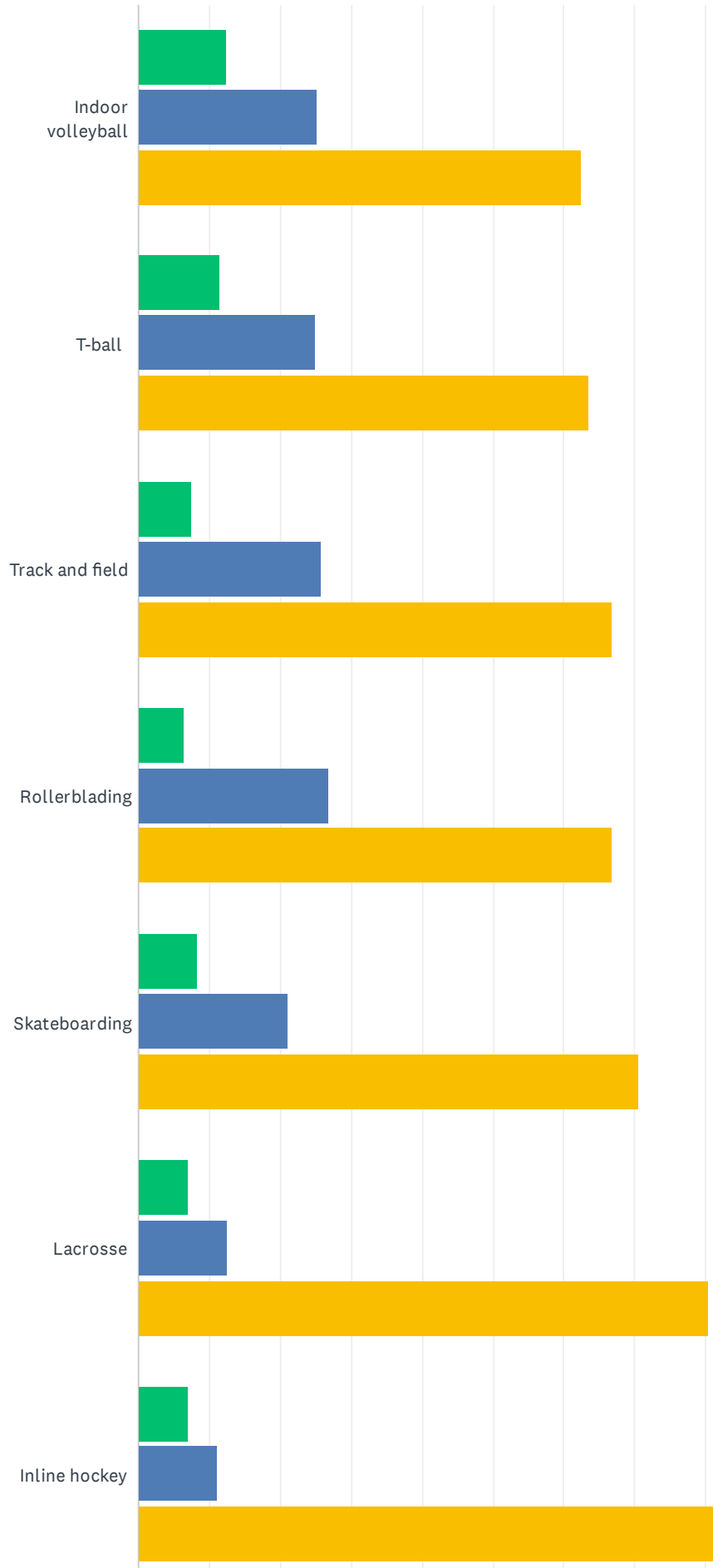
Q10 Please rate your interest in the active athletic activities listed below:

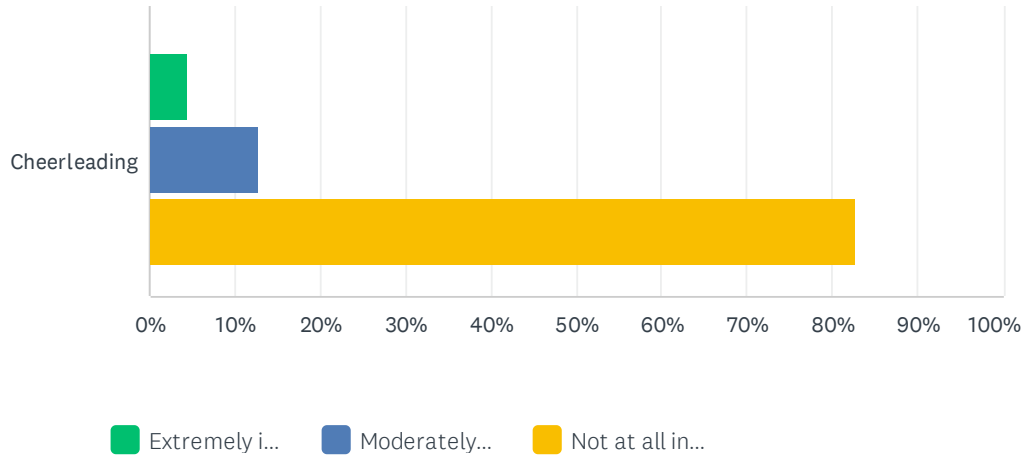
Answered: 231 Skipped: 0











	EXTREMELY INTERESTED	MODERATELY INTERESTED	NOT AT ALL INTERESTED	TOTAL	WEIGHTED AVERAGE
Fitness trail/outdoor fitness equipment	39.09% 86	41.36% 91	19.55% 43	220	2.20
Indoor gym	41.44% 92	36.04% 80	22.52% 50	222	2.19
Playing on a playground	42.60% 95	21.08% 47	36.32% 81	223	2.06
Swimming	35.43% 79	31.84% 71	32.74% 73	223	2.03
Running/jogging	25.11% 56	41.70% 93	33.18% 74	223	1.92
Pickleball	26.36% 58	37.73% 83	35.91% 79	220	1.90
Playing in a sprayground/splashpad	32.27% 71	25.00% 55	42.73% 94	220	1.90
Ropes course	26.94% 59	34.25% 75	38.81% 85	219	1.88
Soccer	30.63% 68	22.52% 50	46.85% 104	222	1.84
Cycling/biking	21.62% 48	40.54% 90	37.84% 84	222	1.84
Baseball	23.85% 52	27.06% 59	49.08% 107	218	1.75
Basketball	21.56% 47	29.82% 65	48.62% 106	218	1.73
Archery	19.72% 43	33.03% 72	47.25% 103	218	1.72
Tennis	15.91% 35	33.18% 73	50.91% 112	220	1.65
Softball	16.59% 36	25.35% 55	58.06% 126	217	1.59
Kickball	13.30% 29	31.19% 68	55.50% 121	218	1.58
Mountain biking	13.43% 29	30.09% 65	56.48% 122	216	1.57
Volleyball	11.98% 26	30.41% 66	57.60% 125	217	1.54
Disc Golf	10.50% 23	28.77% 63	60.73% 133	219	1.50
Football	9.63% 21	30.28% 66	60.09% 131	218	1.50
Indoor volleyball	12.39% 27	25.23% 55	62.39% 136	218	1.50
T-ball	11.52% 25	24.88% 54	63.59% 138	217	1.48
Track and field	7.37% 16	25.81% 56	66.82% 145	217	1.41

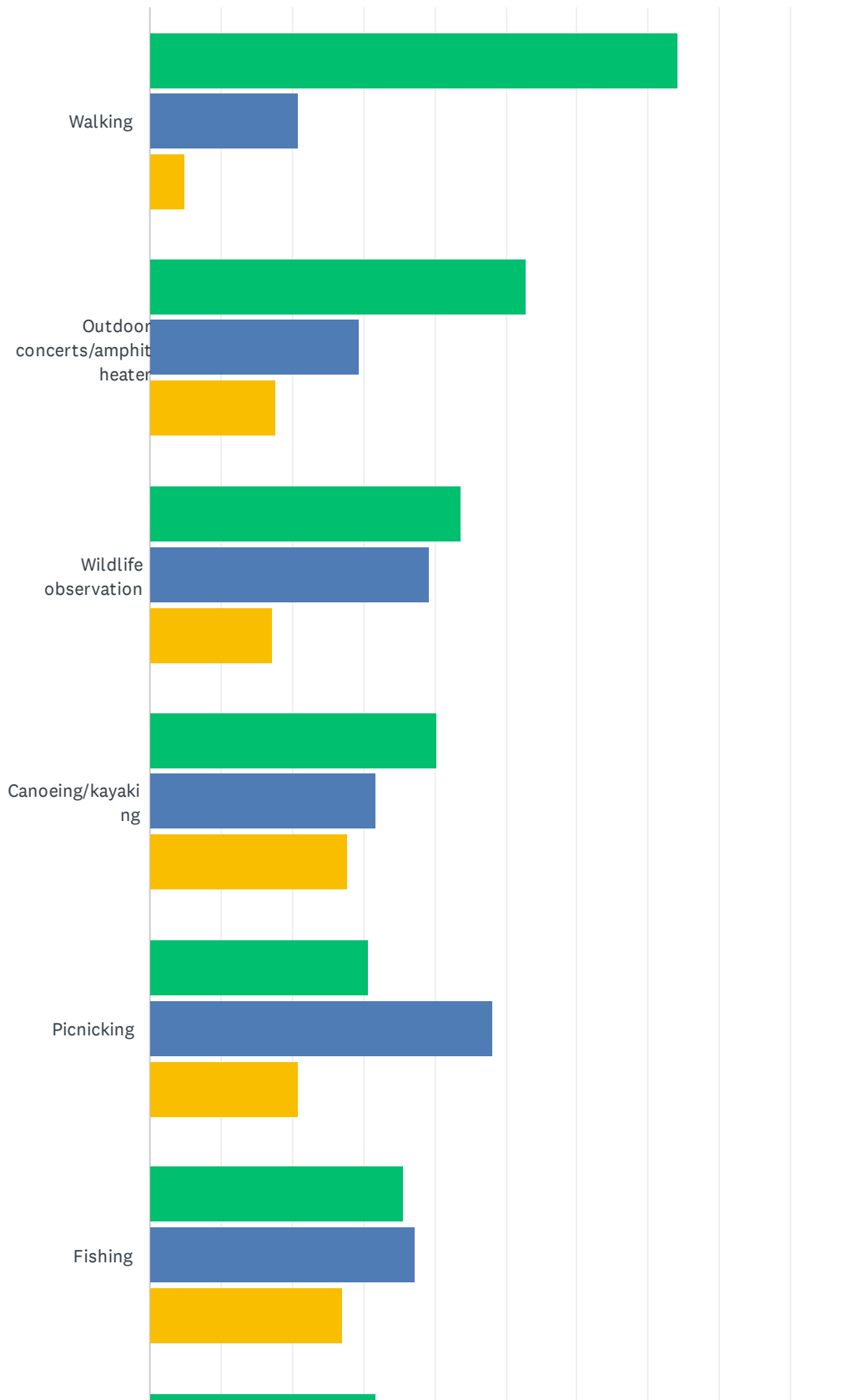
Rollerblading	6.48% 14	26.85% 58	66.67% 144	216	1.40
Skateboarding	8.26% 18	21.10% 46	70.64% 154	218	1.38
Lacrosse	6.98% 15	12.56% 27	80.47% 173	215	1.27
Inline hockey	6.98% 15	11.16% 24	81.86% 176	215	1.25
Cheerleading	4.57% 10	12.79% 28	82.65% 181	219	1.22

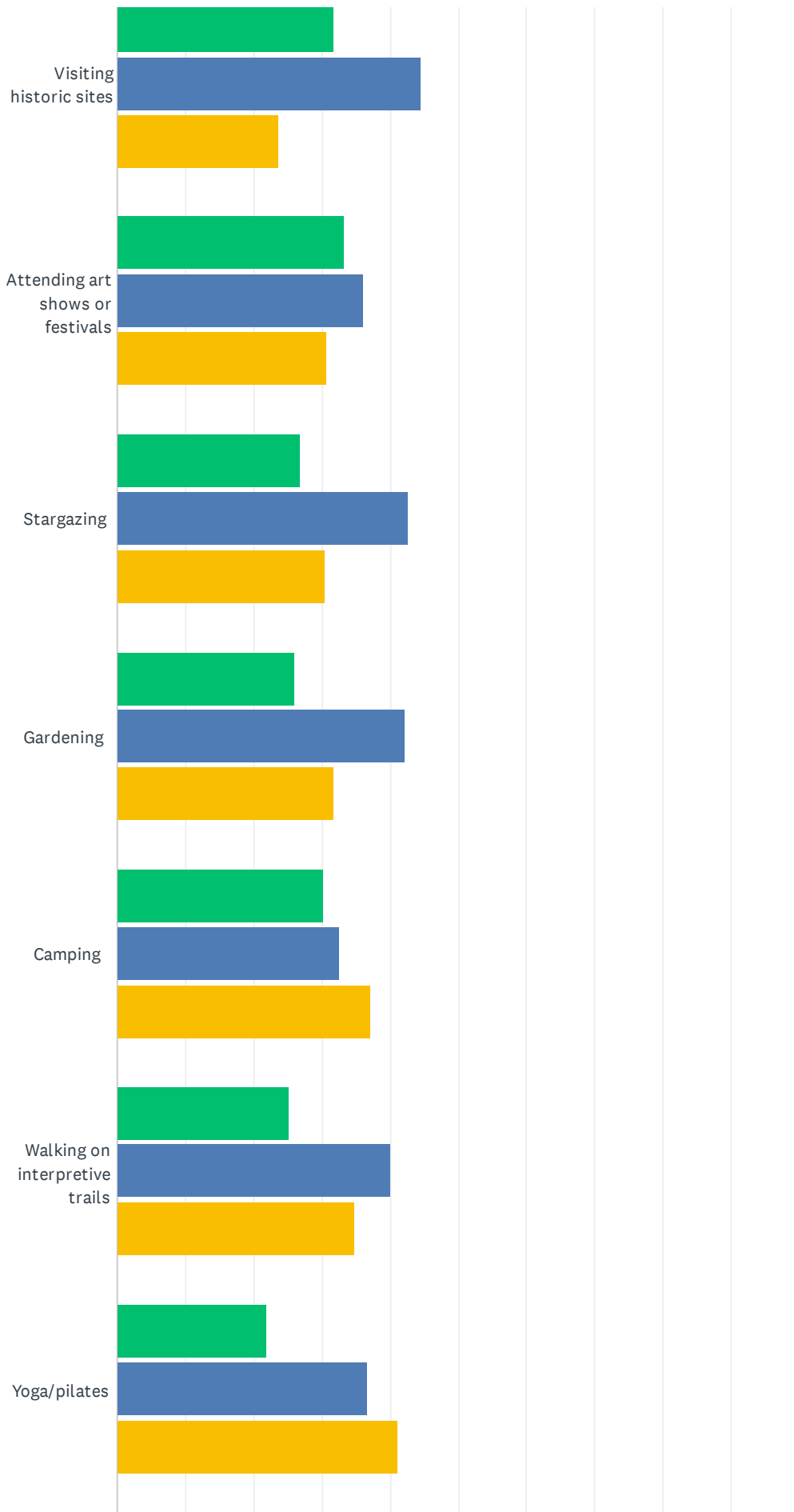
#	OTHER ACTIVE ACTIVITIES YOU ARE INTERESTED IN (PLEASE SPECIFY)	DATE
1	Yoga and pilates	12/16/2024 7:31 AM
2	Target Shooting	12/11/2024 11:47 AM
3	None	12/11/2024 11:01 AM
4	Walking on outdoor track	12/4/2024 12:43 PM
5	bowling and golf	11/27/2024 11:18 AM
6	I know swimming and splash pad are up there but we desperately need those. Thank you.	11/27/2024 1:58 AM
7	Nature study, wildlife, animal tracking and recognition and plants and trees education	11/24/2024 11:04 AM
8	none	11/24/2024 4:33 AM
9	Equestrian both riding and carriage driving and ground work like teaching my horses to dance with me, shooting my rifles and shotguns, gardening	11/23/2024 6:38 PM
10	Hunting, shooting	11/23/2024 1:26 PM
11	Hiking	11/23/2024 11:51 AM
12	Skeet and shooting range	11/23/2024 7:14 AM
13	Outdoor walking	11/22/2024 7:20 PM
14	Basketball!	11/22/2024 5:53 PM
15	Dog Park, Nature Trail	11/22/2024 5:21 PM
16	Honestly-walking trails that connect neighborhoods along roadways (I.e. covered bridge). It would be nice to be able to walk to a park safely!	11/22/2024 3:53 PM
17	Geocaching	11/19/2024 9:22 PM
18	Water park / splash pad playground for the young children	11/17/2024 11:02 AM
19	Greenway/nature trail	11/12/2024 5:38 PM
20	Would love to see more soccer fields	11/7/2024 7:09 AM
21	Soccer fields	11/6/2024 8:30 PM
22	Parkour	11/5/2024 8:32 PM
23	Motocross!	11/5/2024 10:30 AM
24	Dance and Theatre	11/5/2024 10:29 AM
25	Gymnastics	11/5/2024 10:04 AM
26	Golf	11/5/2024 10:02 AM
27	Hockey	11/5/2024 9:14 AM
28	Need a skating rink	11/1/2024 10:16 PM

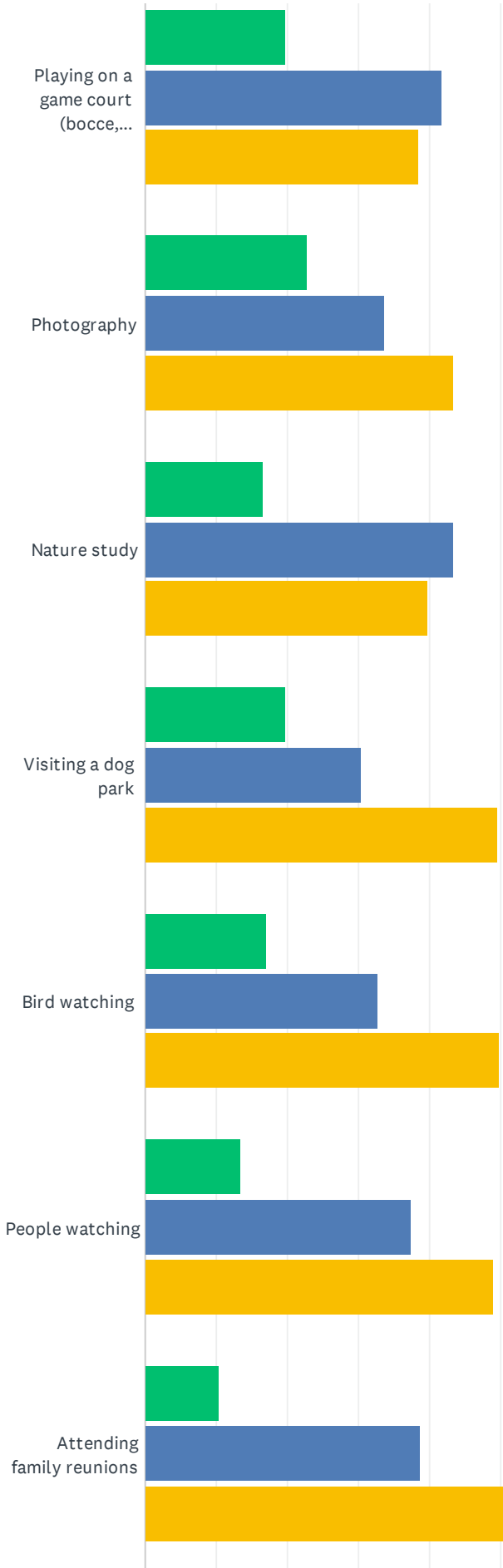
29	Please lock the park on Castleberry someone has been sleeping in their car there consistently	11/1/2024 10:05 AM
30	Rugby	10/31/2024 1:28 PM

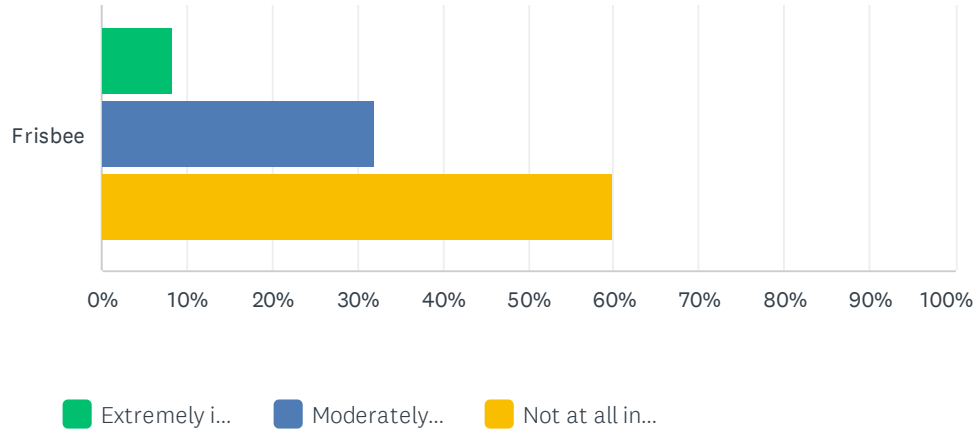
Q11 Please rate your interest in the passive activities listed below:

Answered: 231 Skipped: 0









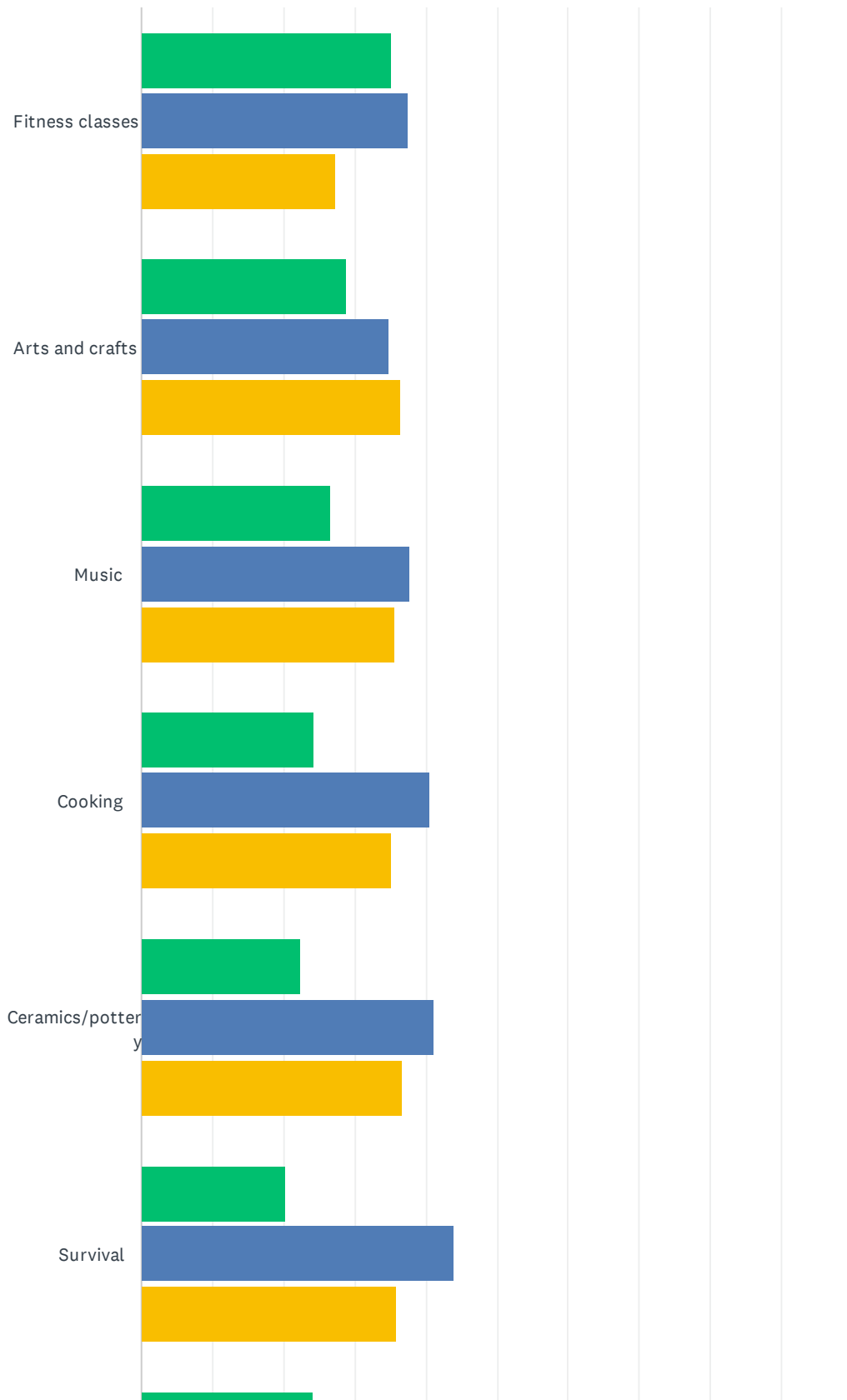
	EXTREMELY INTERESTED	MODERATELY INTERESTED	NOT AT ALL INTERESTED	TOTAL	WEIGHTED AVERAGE
Walking	74.24% 170	20.96% 48	4.80% 11	229	2.69
Outdoor concerts/amphitheater	52.86% 120	29.52% 67	17.62% 40	227	2.35
Wildlife observation	43.61% 99	39.21% 89	17.18% 39	227	2.26
Canoeing/kayaking	40.36% 90	31.84% 71	27.80% 62	223	2.13
Picnicking	30.80% 69	48.21% 108	20.98% 47	224	2.10
Fishing	35.56% 80	37.33% 84	27.11% 61	225	2.08
Visiting historic sites	31.70% 71	44.64% 100	23.66% 53	224	2.08
Attending art shows or festivals	33.33% 75	36.00% 81	30.67% 69	225	2.03
Stargazing	26.91% 60	42.60% 95	30.49% 68	223	1.96
Gardening	26.01% 58	42.15% 94	31.84% 71	223	1.94
Camping	30.36% 68	32.59% 73	37.05% 83	224	1.93
Walking on interpretive trails	25.23% 56	40.09% 89	34.68% 77	222	1.91
Yoga/pilates	21.97% 49	36.77% 82	41.26% 92	223	1.81
Playing on a game court (bocce, horseshoes, shuffleboard)	19.73% 44	41.70% 93	38.57% 86	223	1.81
Photography	22.87% 51	33.63% 75	43.50% 97	223	1.79
Nature study	16.59% 37	43.50% 97	39.91% 89	223	1.77
Visiting a dog park	19.73% 44	30.49% 68	49.78% 111	223	1.70
Bird watching	17.12% 38	32.88% 73	50.00% 111	222	1.67
People watching	13.39% 30	37.50% 84	49.11% 110	224	1.64
Attending family reunions	10.36% 23	38.74% 86	50.90% 113	222	1.59
Frisbee	8.22% 18	31.96% 70	59.82% 131	219	1.48

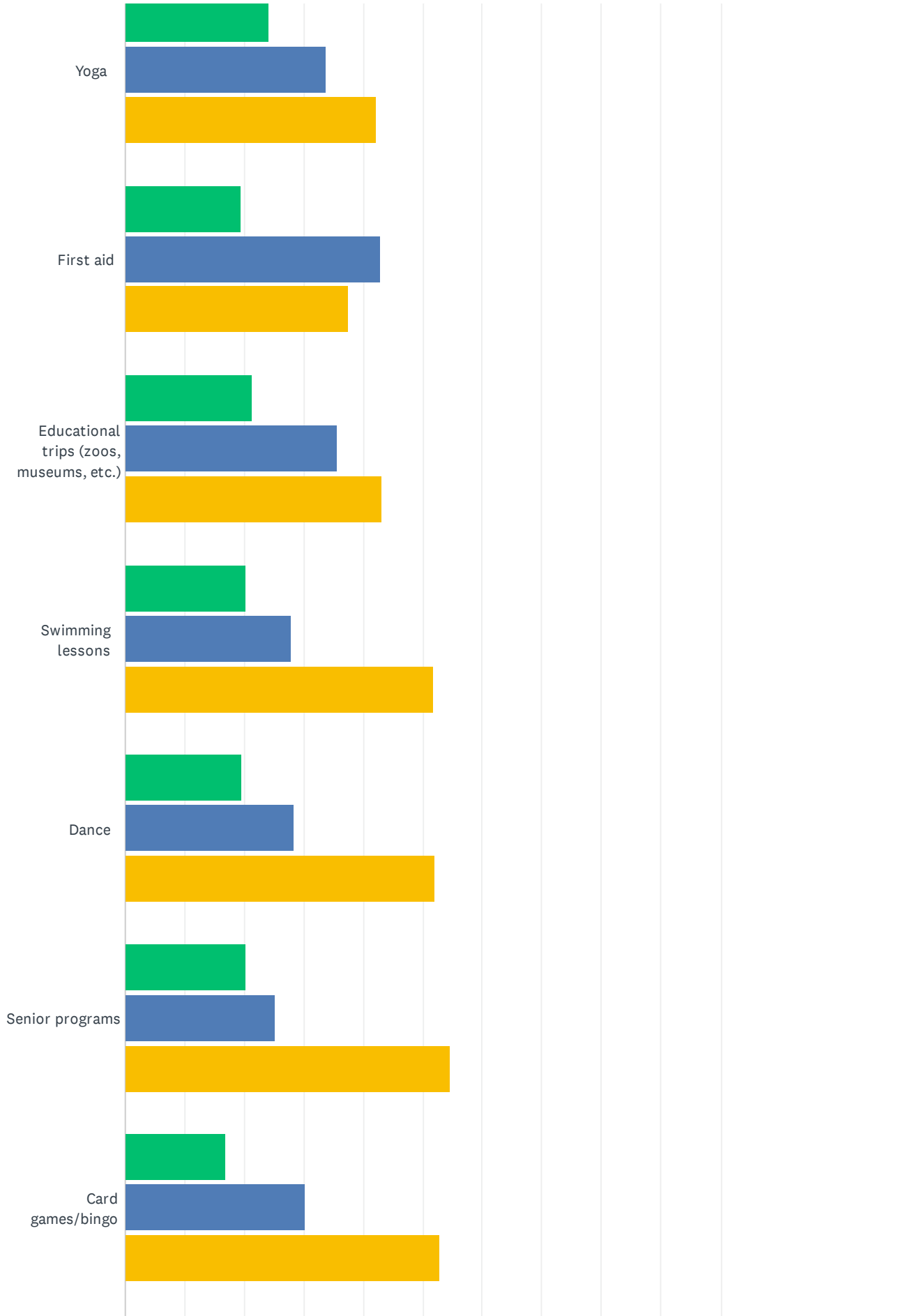
#	OTHER PASSIVE ACTIVITIES YOU ARE INTERESTED IN (PLEASE SPECIFY)	DATE
1	Car Shows	12/11/2024 11:47 AM
2	None	12/11/2024 11:01 AM

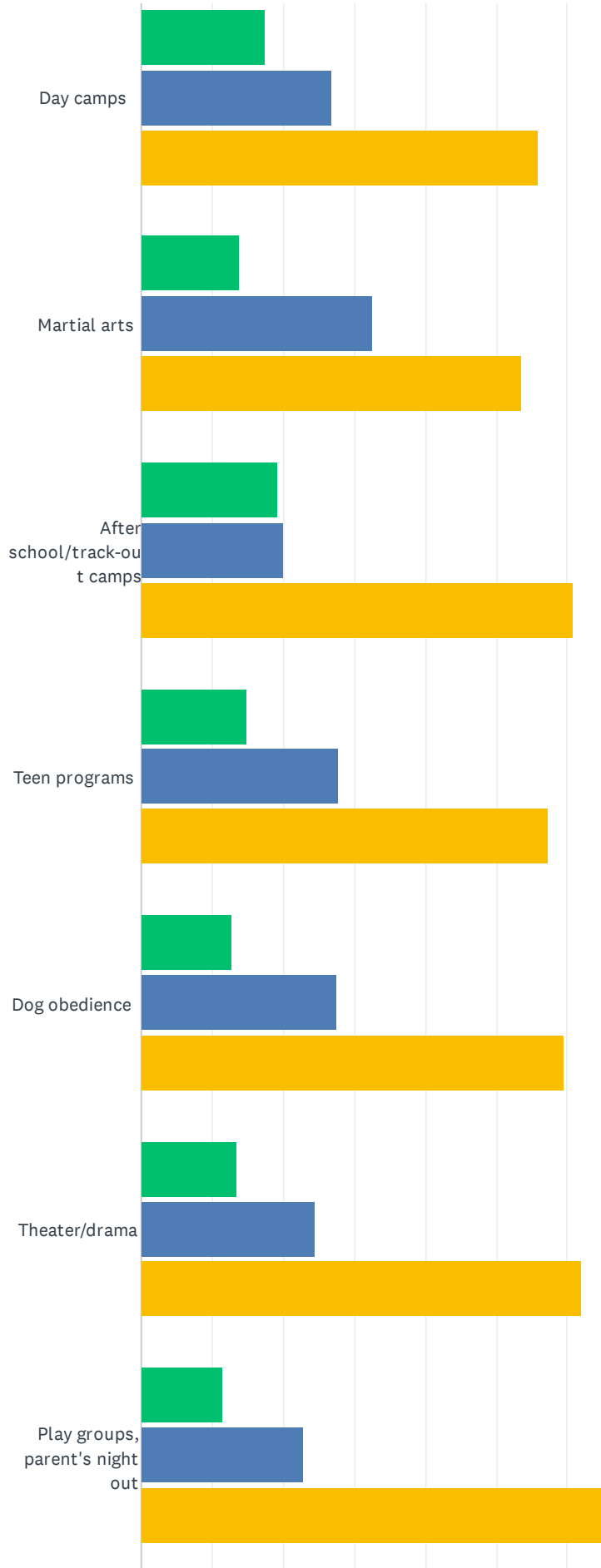
3	If you have that much money to spend pace Raintree drive off buffoon rd I pay town taxes use the money wisely	12/9/2024 11:05 PM
4	Arts and craft lessons	12/4/2024 12:43 PM
5	eating out, bkfst, lunch and dinner and a casual adult drink.	11/27/2024 11:18 AM
6	I guess I am a passive activity person	11/27/2024 1:58 AM
7	Roller Hockey	11/26/2024 8:06 PM
8	Skateboarding	11/25/2024 9:48 PM
9	Hunting / target shooting	11/24/2024 11:04 AM
10	none	11/24/2024 4:33 AM
11	Playing Music (Bluegrass, Acoustic), Activities for seniors	11/23/2024 7:07 PM
12	sewing, quilting, playing dominoes (42), reading, woodcarving and woodturning, making things	11/23/2024 6:38 PM
13	Esports	11/22/2024 5:54 PM
14	Tennis	11/22/2024 5:19 PM
15	Disc golf	11/22/2024 1:39 PM
16	Disc golf	11/18/2024 10:24 AM
17	Having a Cody place to read (hammocks, etc)	11/15/2024 9:12 AM
18	None that require a facility or park	11/14/2024 8:11 PM
19	Visual Art classes/workshops	11/11/2024 3:44 PM
20	Soccer	11/6/2024 8:30 PM
21	Please lock the park on Castleberry someone has been sleeping in their car...	11/1/2024 10:05 AM

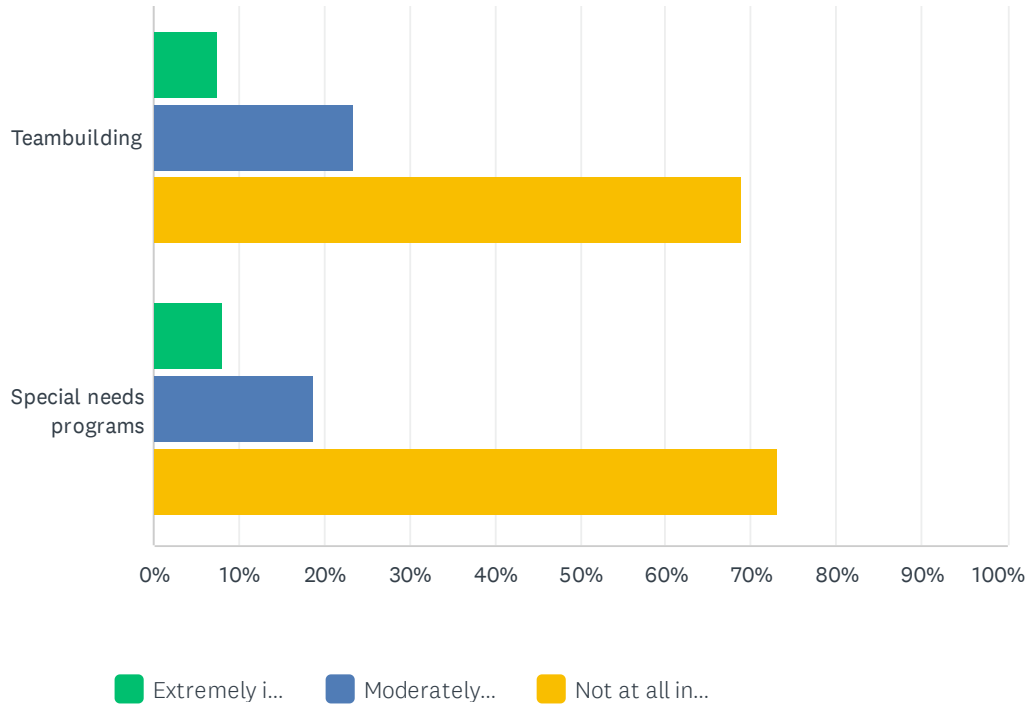
Q12 Please rate your interest in the classes and programs listed below

Answered: 231 Skipped: 0









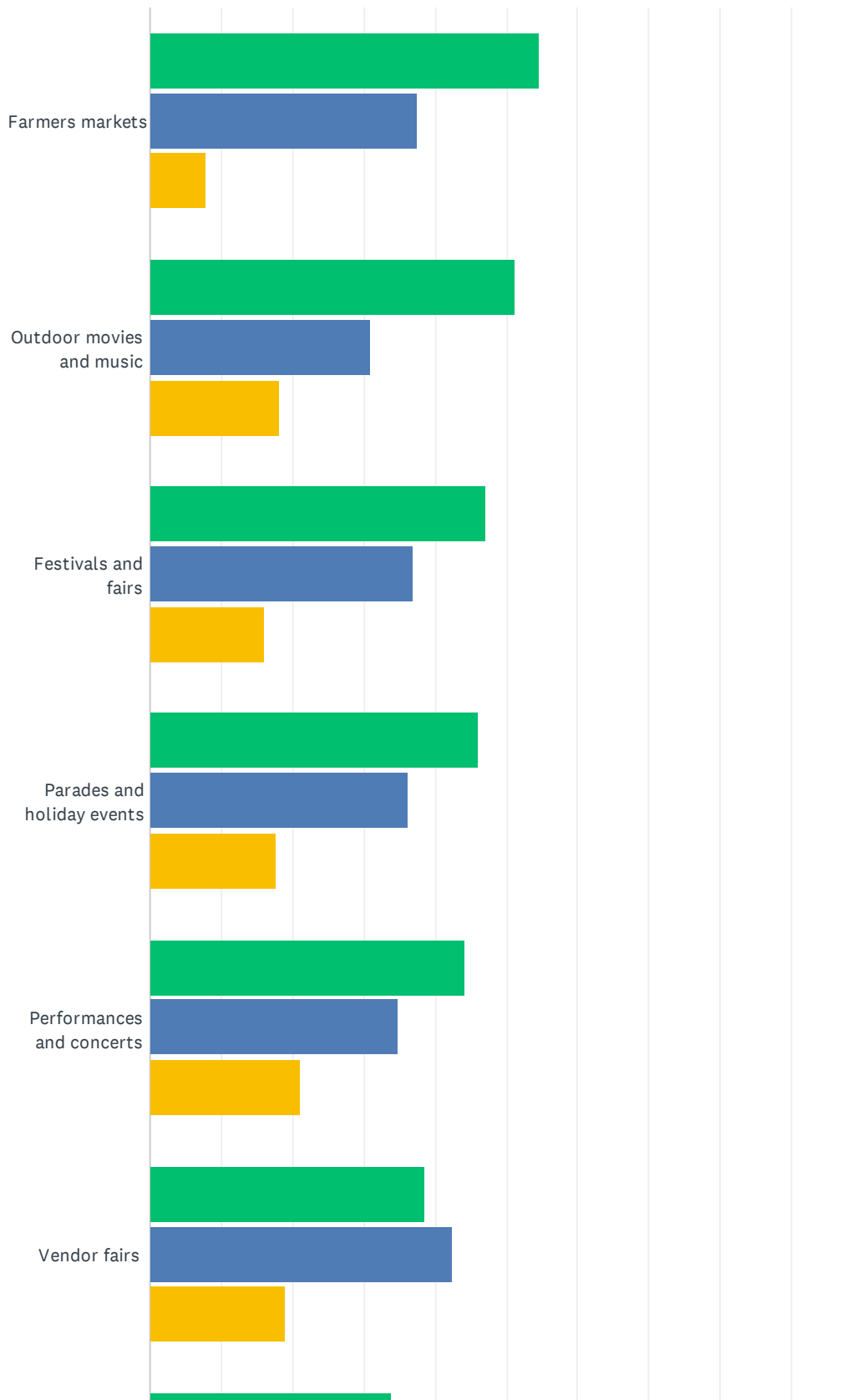
	EXTREMELY INTERESTED	MODERATELY INTERESTED	NOT AT ALL INTERESTED	TOTAL	WEIGHTED AVERAGE
Fitness classes	35.24% 80	37.44% 85	27.31% 62	227	2.08
Arts and crafts	28.89% 65	34.67% 78	36.44% 82	225	1.92
Music	26.67% 60	37.78% 85	35.56% 80	225	1.91
Cooking	24.23% 55	40.53% 92	35.24% 80	227	1.89
Ceramics/pottery	22.32% 50	41.07% 92	36.61% 82	224	1.86
Survival	20.18% 45	43.95% 98	35.87% 80	223	1.84
Yoga	24.00% 54	33.78% 76	42.22% 95	225	1.82
First aid	19.47% 44	42.92% 97	37.61% 85	226	1.82
Educational trips (zoos, museums, etc.)	21.33% 48	35.56% 80	43.11% 97	225	1.78
Swimming lessons	20.35% 46	27.88% 63	51.77% 117	226	1.69
Dance	19.56% 44	28.44% 64	52.00% 117	225	1.68
Senior programs	20.26% 46	25.11% 57	54.63% 124	227	1.66
Card games/bingo	16.89% 38	30.22% 68	52.89% 119	225	1.64
Day camps	17.41% 39	26.79% 60	55.80% 125	224	1.62
Martial arts	13.84% 31	32.59% 73	53.57% 120	224	1.60
After school/track-out camps	19.20% 43	20.09% 45	60.71% 136	224	1.58
Teen programs	14.98% 34	27.75% 63	57.27% 130	227	1.58
Dog obedience	12.89% 29	27.56% 62	59.56% 134	225	1.53
Theater/drama	13.39% 30	24.55% 55	62.05% 139	224	1.51
Play groups, parent's night out	11.61% 26	22.77% 51	65.63% 147	224	1.46
Teambuilding	7.56% 17	23.56% 53	68.89% 155	225	1.39
Special needs programs	8.07% 18	18.83% 42	73.09% 163	223	1.35

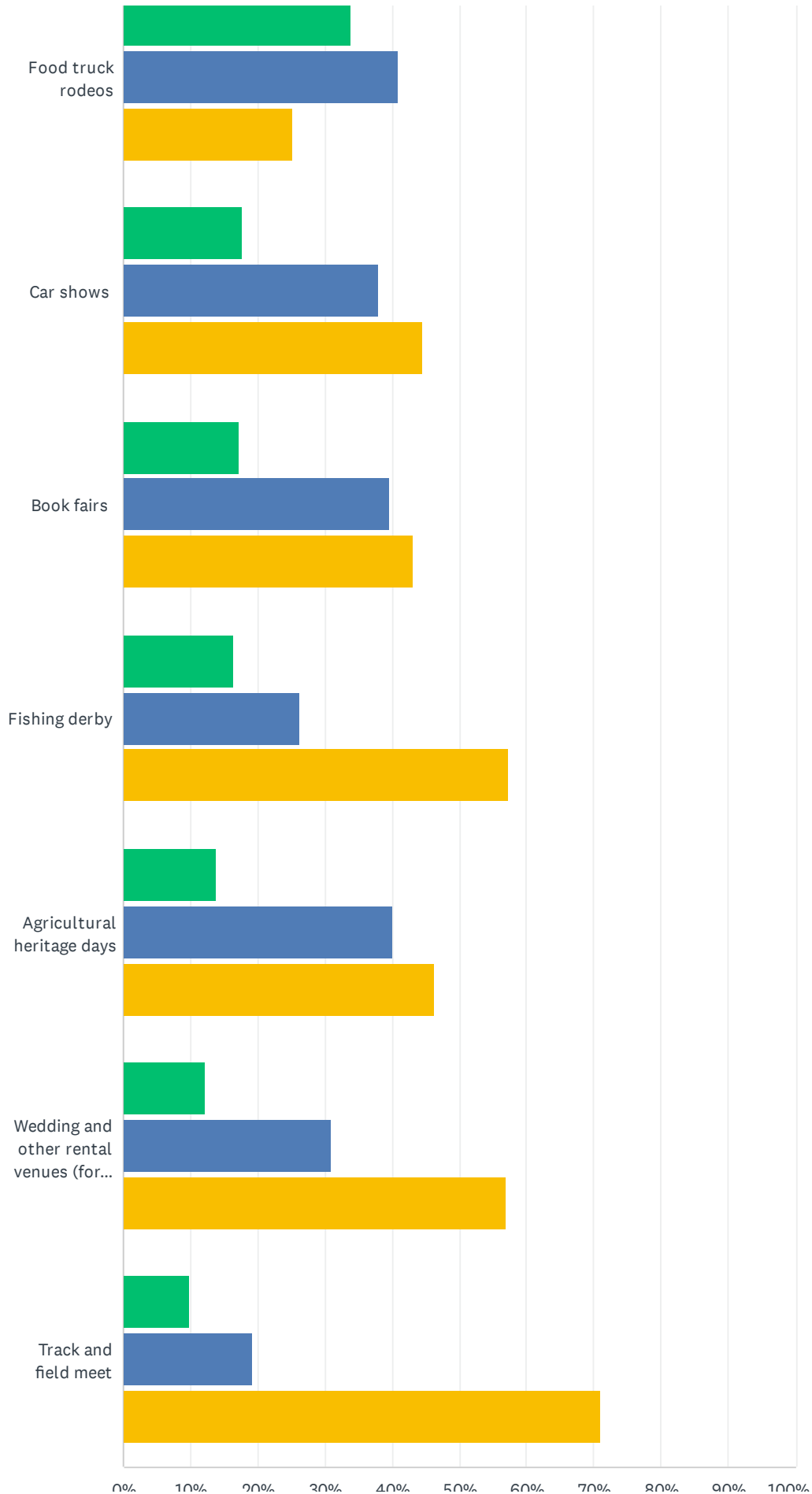
#	OTHER CLASSES AND PROGRAMS YOU ARE INTERESTED IN (PLEASE SPECIFY)	DATE
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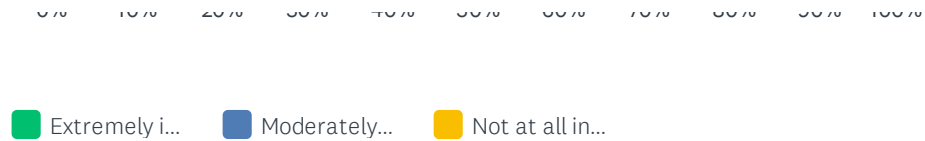
1	None	12/11/2024 11:01 AM
2	none	11/24/2024 4:33 AM
3	Musical instrument classes	11/23/2024 7:07 PM
4	NOT interested in being among crowds of people, a small number is OK	11/23/2024 6:38 PM
5	None	11/14/2024 8:11 PM
6	Please lock the park on Castleberry someone has been sleeping in their car. I'm interested in the game plan for that	11/1/2024 10:05 AM

Q13 Please rate your interest in the special events listed below

Answered: 231 Skipped: 0





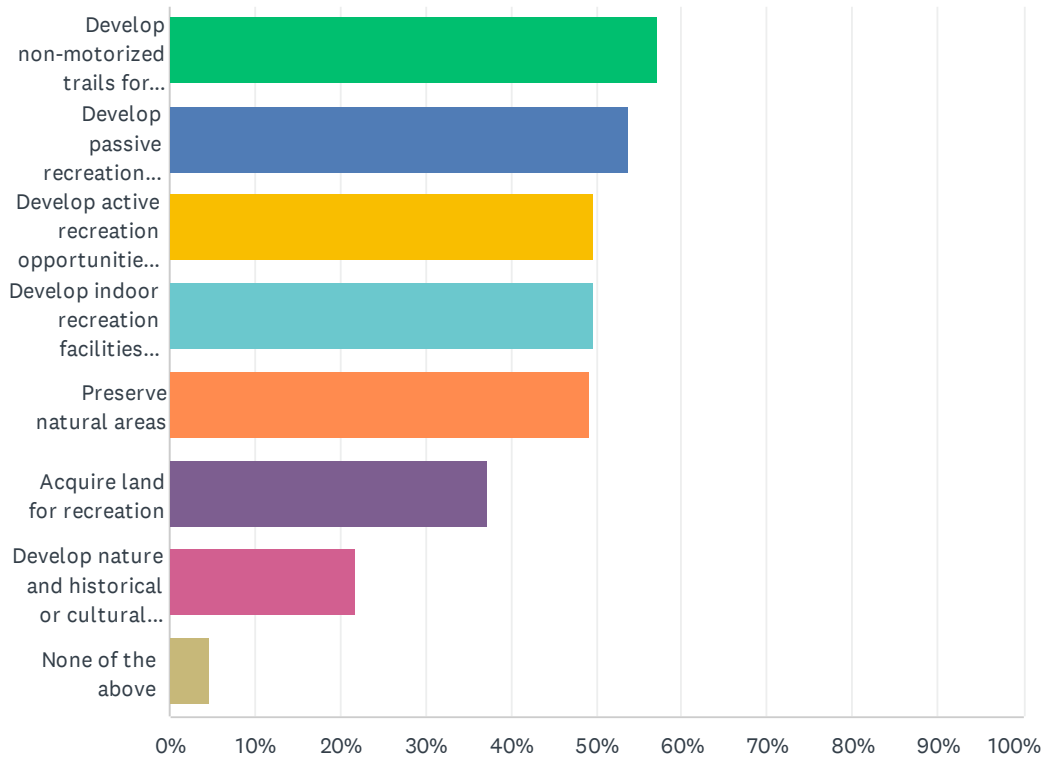


	EXTREMELY INTERESTED	MODERATELY INTERESTED	NOT AT ALL INTERESTED	TOTAL	WEIGHTED AVERAGE
Farmers markets	54.59% 125	37.55% 86	7.86% 18	229	2.47
Outdoor movies and music	51.10% 116	30.84% 70	18.06% 41	227	2.33
Festivals and fairs	47.19% 109	36.80% 85	16.02% 37	231	2.31
Parades and holiday events	46.02% 104	36.28% 82	17.70% 40	226	2.28
Performances and concerts	44.05% 100	34.80% 79	21.15% 48	227	2.23
Vendor fairs	38.50% 87	42.48% 96	19.03% 43	226	2.19
Food truck rodeos	33.92% 77	40.97% 93	25.11% 57	227	2.09
Car shows	17.62% 40	37.89% 86	44.49% 101	227	1.73
Book fairs	17.33% 39	39.56% 89	43.11% 97	225	1.74
Fishing derby	16.44% 37	26.22% 59	57.33% 129	225	1.59
Agricultural heritage days	13.78% 31	40.00% 90	46.22% 104	225	1.68
Wedding and other rental venues (for reunions, birthday parties, other events)	12.11% 27	30.94% 69	56.95% 127	223	1.55
Track and field meet	9.82% 22	19.20% 43	70.98% 159	224	1.39

#	OTHER SPECIAL EVENTS YOU ARE INTERESTED IN (PLEASE SPECIFY)	DATE
1	All offered by Clayton a few miles down the road	12/16/2024 7:31 AM
2	None	12/11/2024 11:01 AM
3	none	11/24/2024 4:33 AM
4	Events where my ponies can be involved, allow horses on hiking & biking trails	11/23/2024 6:38 PM
5	concerts	11/23/2024 10:10 AM
6	Please lock the park on Castleberry.	11/1/2024 10:05 AM

Q14 Which initiatives should the Town of Archer Lodge prioritize for future implementation? Check all that apply.

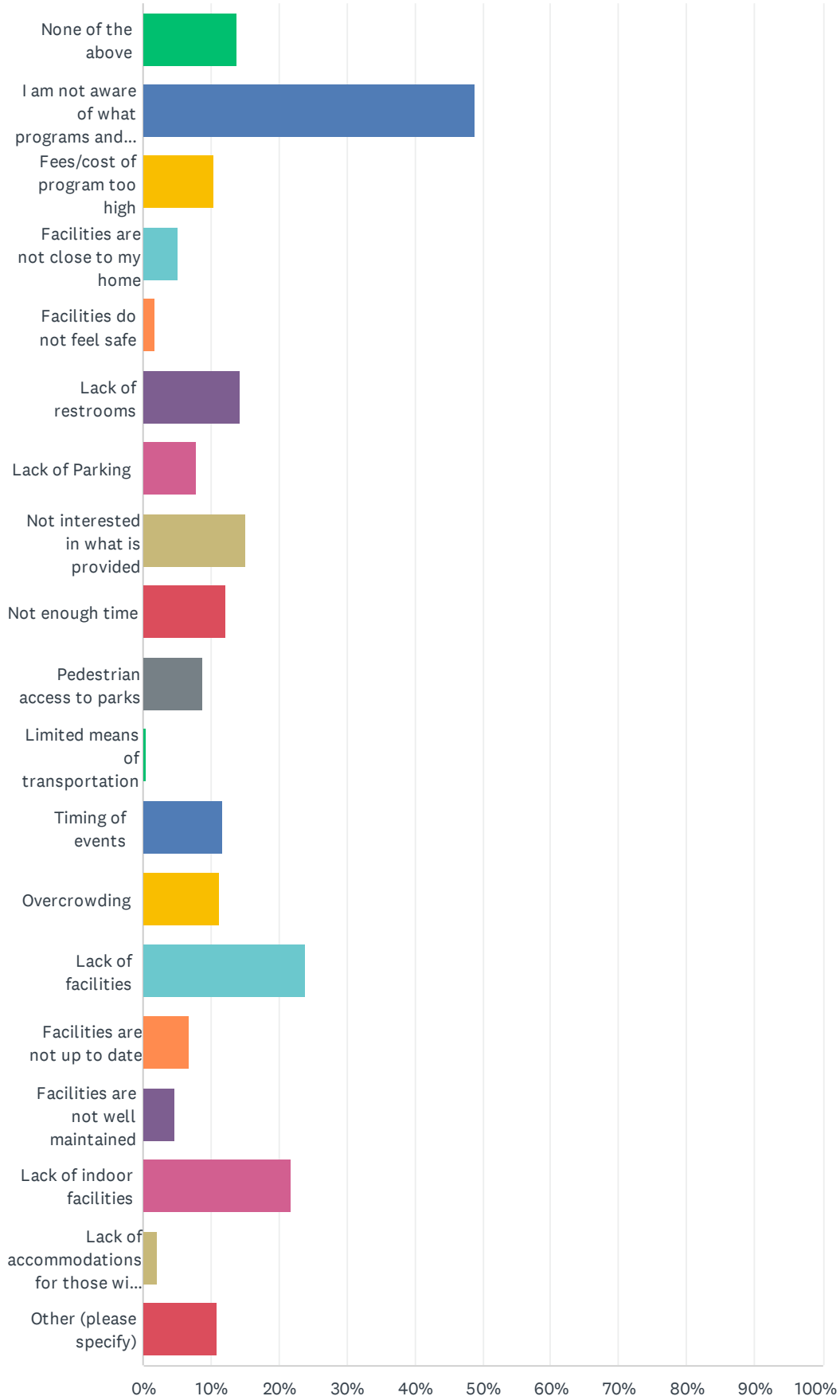
Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES	
Develop non-motorized trails for walking and biking that connect schools, parks, neighborhoods, and other facilities	57.14%	132
Develop passive recreation opportunities (hiking, picnicking, etc.)	53.68%	124
Develop active recreation opportunities (ball fields, soccer etc.)	49.78%	115
Develop indoor recreation facilities (recreation center, gyms, pools etc.)	49.78%	115
Preserve natural areas	49.35%	114
Acquire land for recreation	37.23%	86
Develop nature and historical or cultural programs	21.65%	50
None of the above	4.76%	11
Total Respondents: 231		

**Q15 Which (if any) of the following do you feel are barriers to your participation in Town of Archer Lodge recreational programs and facilities?
Select all that apply.**

Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES
None of the above	13.85% 32
I am not aware of what programs and facilities are offered	48.92% 113
Fees/cost of program too high	10.39% 24
Facilities are not close to my home	5.19% 12
Facilities do not feel safe	1.73% 4
Lack of restrooms	14.29% 33
Lack of Parking	7.79% 18
Not interested in what is provided	15.15% 35
Not enough time	12.12% 28
Pedestrian access to parks	8.66% 20
Limited means of transportation	0.43% 1
Timing of events	11.69% 27
Overcrowding	11.26% 26
Lack of facilities	23.81% 55
Facilities are not up to date	6.93% 16
Facilities are not well maintained	4.76% 11
Lack of indoor facilities	21.65% 50
Lack of accommodations for those with accessibility limitations	2.16% 5
Other (please specify)	10.82% 25
Total Respondents: 231	

#	OTHER (PLEASE SPECIFY)	DATE
1	Seniors with limited sports mobility. They may look normal on the outside, but their joints hurt to do certain athletic things.	12/11/2024 11:47 AM
2	Don't need anything else that will make my taxes increase.	12/11/2024 11:01 AM
3	Community Center doesn't seem to have regular hours	12/10/2024 3:07 PM
4	No need for any of these cost. This is not a town just a tangled web weaved to stop assumed annexation	12/5/2024 10:14 AM
5	Kids are not the only ones who enjoy recreation activities. Too much focus on ball fields!	12/4/2024 12:43 PM
6	Na	12/1/2024 5:23 PM
7	Castleberry playground needs light	11/30/2024 2:58 PM
8	Lack of indoor activities	11/27/2024 1:58 AM
9	Need a Hockey Roller Rink	11/26/2024 8:06 PM
10	It just makes taxes higher	11/26/2024 2:35 PM
11	Please build a skatepark	11/25/2024 9:48 PM
12	I work over 50 miles away so other than weekends I don't have the time right now	11/24/2024 11:04 AM

13	I have absolutely no information about anything offered by the Rec. Dept.	11/23/2024 7:07 PM
14	lack of activities for horses and ponies and their people	11/23/2024 6:38 PM
15	Town members are not welcoming	11/22/2024 7:16 PM
16	Facilities seem mostly catered to team sports	11/22/2024 5:54 PM
17	Archer Lodge taxes are already too high. All of these "initiatives" will contribute to increases in those taxes just as the new park did.	11/22/2024 2:09 PM
18	Need a disc golf course	11/18/2024 10:24 AM
19	You can't use the fields when you lock them down all the time! I'm paying taxes but can't use them to practice? Ridiculous!	11/14/2024 8:53 AM
20	Will be moving to Archer Lodge in April	11/12/2024 10:23 PM
21	No soccer fields that are well maintained	11/8/2024 3:32 PM
22	Parks and Rec director does nothing. Doesn't understand this area	11/5/2024 10:41 AM
23	Outdoor lighting around playgrounds.	11/5/2024 9:20 AM
24	We are closer to archer lodge than Clayton but not in neither district so need to rezons	11/1/2024 10:16 PM
25	People sleeping in their car at the park on Castleberry	11/1/2024 10:05 AM

Q16 Please list any athletic leagues that you have participated in during the past 12 months (if any):

Answered: 170 Skipped: 61

#	RESPONSES	DATE
1	None	12/18/2024 2:56 PM
2	.	12/17/2024 9:22 PM
3	NA	12/16/2024 4:38 PM
4	None Please dissolve Archer Lodge and let us become part of Clayton. A total waste of money.	12/16/2024 7:31 AM
5	None	12/11/2024 11:47 AM
6	None	12/11/2024 11:01 AM
7	Toddler flag football	12/11/2024 7:21 AM
8	JCLL Baseball, AL Softball, Direction Volleyball, NRFA Futsal	12/9/2024 12:52 PM
9	None	12/5/2024 10:14 AM
10	Soccer	12/4/2024 7:01 PM
11	Bowling	12/4/2024 12:43 PM
12	None	12/2/2024 6:52 AM
13	Na	12/1/2024 5:23 PM
14	n/a	12/1/2024 12:05 PM
15	NRFA	12/1/2024 11:12 AM
16	None	12/1/2024 7:23 AM
17	NRFA	11/30/2024 7:55 PM
18	Baseball, softball	11/30/2024 2:58 PM
19	None	11/29/2024 6:36 PM
20	TASL	11/29/2024 2:30 PM
21	None in archers lodge	11/29/2024 7:20 AM
22	None	11/27/2024 8:05 PM
23	None	11/27/2024 7:25 PM
24	Bowling in Clayton	11/27/2024 11:18 AM
25	N/A	11/27/2024 11:09 AM
26	YMCA gym, ymca pool, walking trail	11/27/2024 1:58 AM
27	Hockey x 3	11/26/2024 8:06 PM
28	None	11/26/2024 7:05 PM
29	Archer lodge girls softball Boys hockey Polar ice house	11/26/2024 7:04 PM
30	N/a	11/26/2024 5:08 PM
31	YMCA Runners	11/26/2024 3:35 PM

32	Pickleball, softball, volleyball	11/26/2024 3:11 PM
33	Baseball	11/26/2024 2:35 PM
34	None	11/26/2024 1:01 PM
35	None	11/26/2024 7:15 AM
36	None	11/25/2024 9:18 PM
37	Jcaa, wendell parks and rec, joco volleyball	11/25/2024 8:21 PM
38	My grandson who lives with us participated in senior baseball this fall	11/25/2024 3:06 PM
39	NONE	11/25/2024 12:53 PM
40	CYLC Lacrosse, Wave Swimming, Riverwood Rays swim team	11/25/2024 9:20 AM
41	Volleyball	11/25/2024 8:08 AM
42	None	11/25/2024 7:29 AM
43	None	11/24/2024 8:58 PM
44	Taking my 3 year old grandson to the new park.	11/24/2024 6:51 PM
45	Na	11/24/2024 1:25 PM
46	None	11/24/2024 11:04 AM
47	Na	11/24/2024 6:29 AM
48	none	11/24/2024 4:33 AM
49	Neuse River Futbol Alliance	11/23/2024 8:44 PM
50	JCLL, i9	11/23/2024 7:28 PM
51	None	11/23/2024 7:07 PM
52	None	11/23/2024 5:29 PM
53	None	11/23/2024 4:05 PM
54	None	11/23/2024 2:14 PM
55	N/A	11/23/2024 12:21 PM
56	N/a	11/23/2024 11:51 AM
57	None	11/23/2024 11:43 AM
58	PDGA Professional Disc Golf	11/23/2024 11:16 AM
59	.	11/23/2024 11:05 AM
60	Clayton parks and rec, Garner Baseball Inc,	11/23/2024 10:26 AM
61	o	11/23/2024 10:10 AM
62	Volleyball. Soccer. Wrestling. Fishing	11/23/2024 10:00 AM
63	None	11/23/2024 9:25 AM
64	None	11/23/2024 5:03 AM
65	NRFA YMCA	11/22/2024 10:31 PM
66	None	11/22/2024 8:25 PM
67	Softball	11/22/2024 7:20 PM
68	NA	11/22/2024 6:30 PM
69	Town of Wendell, Town of Clayton	11/22/2024 6:27 PM

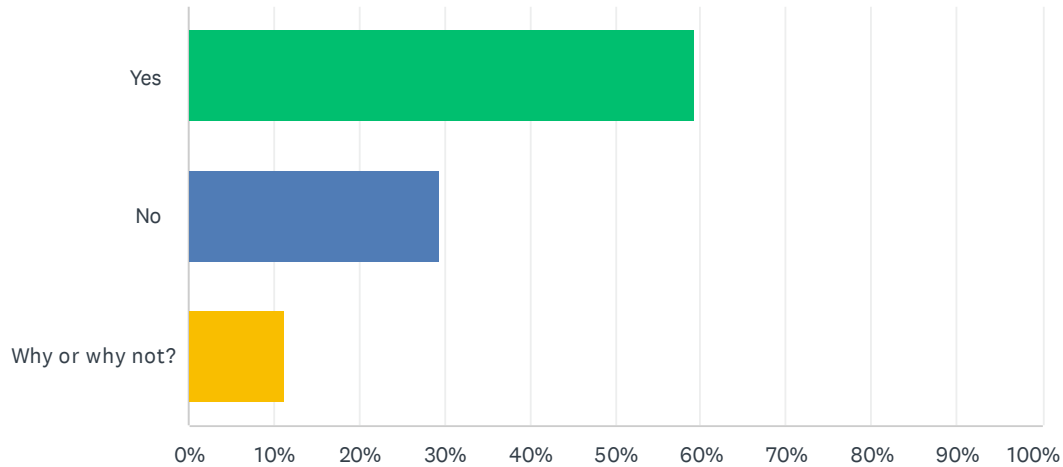
70	Bowling	11/22/2024 6:25 PM
71	None	11/22/2024 5:54 PM
72	None	11/22/2024 5:37 PM
73	USTA	11/22/2024 5:19 PM
74	None	11/22/2024 5:08 PM
75	JC Little League	11/22/2024 4:57 PM
76	Pickleball	11/22/2024 4:53 PM
77	Basketball, swimming	11/22/2024 4:45 PM
78	Clayton Civitan Lacrosse	11/22/2024 4:22 PM
79	Soccer, dance	11/22/2024 4:21 PM
80	JCLL baseball-son	11/22/2024 3:53 PM
81	Not applicable	11/22/2024 3:39 PM
82	i9 sports, hurricanes house league hockey	11/22/2024 3:23 PM
83	Upward sports program for basketball and soccer at Shiloh Baptist and Bethlehem Baptist	11/22/2024 2:45 PM
84	Raleigh old men's baseball league	11/22/2024 2:09 PM
85	JcII little league	11/22/2024 12:30 PM
86	NRFA soccer league	11/19/2024 9:22 PM
87	Disc golf practice, for fun and exercise and tournaments	11/18/2024 10:24 AM
88	none	11/18/2024 8:21 AM
89	JCLL, Travel baseball,East Wake Football	11/16/2024 8:29 AM
90	None	11/15/2024 5:30 PM
91	Bowling (preteen league)	11/15/2024 12:59 PM
92	None	11/15/2024 11:34 AM
93	Not through parks and rec but we just completed flying feet located at the castleberry park	11/15/2024 8:17 AM
94	None	11/15/2024 7:15 AM
95	N/a	11/15/2024 6:04 AM
96	N/A	11/14/2024 11:49 PM
97	None	11/14/2024 11:10 PM
98	None	11/14/2024 8:11 PM
99	None	11/14/2024 8:11 PM
100	JcII - great Travel baseball Wrestling Clayton parks basketball	11/13/2024 8:01 PM
101	Coached baseball	11/12/2024 10:23 PM
102	Disc Golf	11/12/2024 6:14 PM
103	None	11/10/2024 1:50 PM
104	Neuse River Futbol Association	11/10/2024 1:36 PM
105	NRFA	11/8/2024 3:32 PM
106	Soccer, basketball,football	11/7/2024 9:08 AM
107	Town of Clayton Tennis i9 Sports - flag football and volleyball NRFA	11/7/2024 7:09 AM

108	NRFA Soccer Johnston County Little League I9 Sports	11/6/2024 10:19 PM
109	Soccer	11/6/2024 8:30 PM
110	Clayton Rec basketball NRFA academy soccer Wendell rec basketball	11/6/2024 8:06 PM
111	None	11/6/2024 9:50 AM
112	JCLL, NRFA, i9,	11/6/2024 7:06 AM
113	JCLL and Tar Heel baseball league	11/5/2024 9:24 PM
114	NCFC, NRFA, Dynamic Wrestling(Clayton High/ALA), Clayton Civitian Lacrosse.	11/5/2024 8:32 PM
115	Soccer	11/5/2024 4:50 PM
116	Nrfa	11/5/2024 3:55 PM
117	JCLL Little League and All-Stars Travel baseball	11/5/2024 3:48 PM
118	Nrfa	11/5/2024 3:25 PM
119	GCAA, NRFA	11/5/2024 12:58 PM
120	Soccer	11/5/2024 12:55 PM
121	Soccer	11/5/2024 12:40 PM
122	NRFA rec soccer, ALMS soccer, Clayton parks and Rec basketball, SRAC fall and spring swim training, SRAC summer swim team, CHHS swim team	11/5/2024 12:11 PM
123	School cross country, swimming. Neuse river classic and rec soccer	11/5/2024 11:53 AM
124	NRFA Soccer GCAA Soccer TigerShark Aquatics swim team Marlins of Raleigh swim team First Goal and Lil Canes Hockey Garner/Cary	11/5/2024 11:24 AM
125	NRFA soccer, CHHS swimming and soccer, ALMS soccer	11/5/2024 11:20 AM
126	NRFA	11/5/2024 10:44 AM
127	Basketball with town of clayton	11/5/2024 10:41 AM
128	NRFA	11/5/2024 10:36 AM
129	Softball and Soccer	11/5/2024 10:30 AM
130	NRFA Soccer	11/5/2024 10:29 AM
131	Soccer	11/5/2024 10:29 AM
132	NRFA soccer	11/5/2024 10:27 AM
133	JCLL - AND TRAVEL TEAMS - ALSO WENDELL SOFTBALL	11/5/2024 10:22 AM
134	Soccer	11/5/2024 10:04 AM
135	Little league, tball, nfrc	11/5/2024 10:02 AM
136	NRFA Town of Clayton Basketball and Baseball	11/5/2024 9:57 AM
137	NRFA	11/5/2024 9:54 AM
138	NRFA, Tball, Baseball, Boot Camps	11/5/2024 9:52 AM
139	Soccer. Basketball. Softball	11/5/2024 9:50 AM
140	Soccer and swimming	11/5/2024 9:37 AM
141	NRFA	11/5/2024 9:31 AM
142	Club soccer	11/5/2024 9:22 AM
143	Softball	11/5/2024 9:20 AM
144	NRFA, GCAA	11/5/2024 9:18 AM

145	Disc golf	11/5/2024 9:16 AM
146	NRFA	11/5/2024 9:15 AM
147	NRFA Soccer, Hockey	11/5/2024 9:14 AM
148	Soccer and Baseball	11/5/2024 9:14 AM
149	Neuse River Futbol club	11/4/2024 10:16 PM
150	Baseball and soccet	11/4/2024 8:42 PM
151	JCLL	11/4/2024 7:24 PM
152	NRFA	11/4/2024 5:02 PM
153	Neuse River Futball Association	11/4/2024 4:19 PM
154	Baseball and softball	11/3/2024 9:25 PM
155	Football, dance	11/3/2024 7:24 PM
156	I9 Sports	11/3/2024 1:37 PM
157	none	11/3/2024 1:04 PM
158	Senior baseball 13-15	11/1/2024 11:41 PM
159	Clayton rec	11/1/2024 10:16 PM
160	None	11/1/2024 1:38 PM
161	Vball baseball	11/1/2024 10:05 AM
162	NRFA, town of Clayton (basketball), town of Wendell (beach volleyball)	11/1/2024 9:51 AM
163	Baseball	11/1/2024 9:46 AM
164	Bmx racing.	11/1/2024 9:21 AM
165	None	10/31/2024 8:58 PM
166	JCLL Baseball GBI baseball	10/31/2024 2:54 PM
167	None	10/31/2024 2:39 PM
168	Clayton copperhead tackle rugby Clayton wombats touch rugby	10/31/2024 1:28 PM
169	Tball	10/31/2024 1:13 PM
170	None	10/31/2024 1:08 PM

Q17 Would you be willing to pay higher fees for more recreation programs and/or improved facilities?

Answered: 231 Skipped: 0



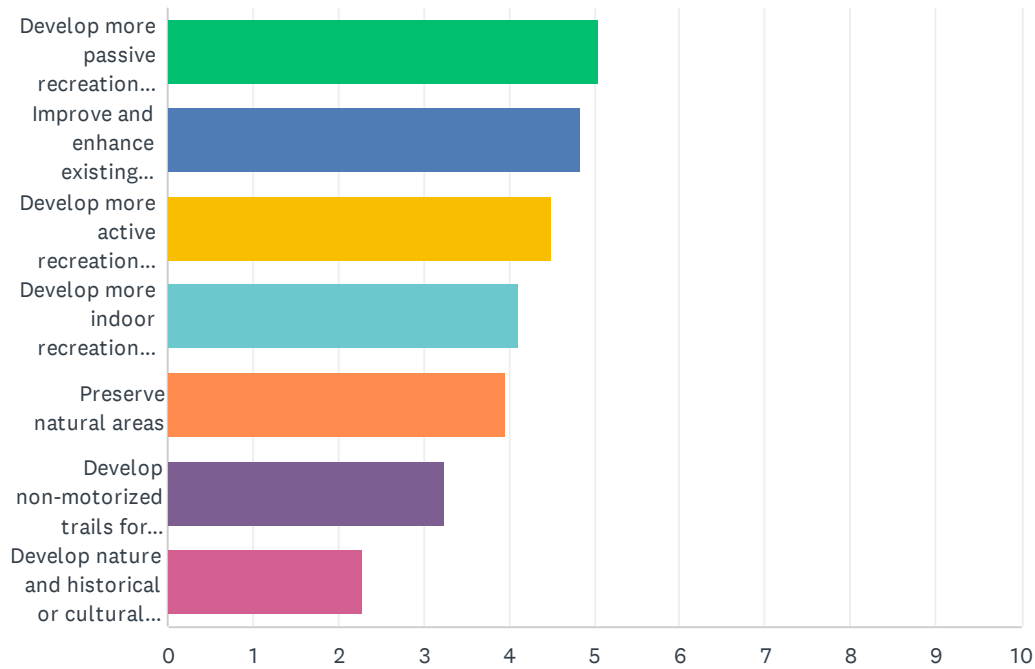
ANSWER CHOICES	RESPONSES
Yes	59.31% 137
No	29.44% 68
Why or why not?	11.26% 26
TOTAL	231

#	WHY OR WHY NOT?	DATE
1	Depends	12/12/2024 2:28 PM
2	Depends on the amount, does it fit my schedule and is it a fair \$\$ for value.	12/11/2024 11:47 AM
3	Within reason	12/10/2024 3:07 PM
4	If it can't be funded with the money that is already in the budget then I am not interested.	11/30/2024 7:55 PM
5	Because I don't use them.	11/27/2024 11:18 AM
6	FIXED INCOME HOUSEHOLD	11/25/2024 12:53 PM
7	Fixed income	11/24/2024 9:12 PM
8	Only if the fees are used for that specific activity, e.g., I don't want to pay to play cards in order to support soccer.	11/23/2024 7:07 PM
9	Too many programs and the tail wags the dog, pretty soon you run out of other peoples' money	11/23/2024 6:38 PM
10	Yes, if I am using that facility.	11/23/2024 5:44 PM
11	Not sure. Depends	11/23/2024 4:05 PM
12	No recreation programs shouldn't cost 150-200 especially when you have multiple children	11/22/2024 10:31 PM
13	Depends on what we are getting	11/22/2024 7:20 PM
14	Depends on the program/facility	11/22/2024 6:41 PM

15	The town needs recreation facilities that are low upkeep and will be the least tax burden thus low/no fees	11/22/2024 5:54 PM
16	Willing to pay for quality programs	11/22/2024 5:21 PM
17	Taxes	11/22/2024 5:14 PM
18	Taxes are already astronomical and rather than making things that are not adding value to the community...like more town cars...places where families can go would be more beneficial	11/22/2024 4:45 PM
19	Can't afford without financial assistance	11/22/2024 1:39 PM
20	Costs are impossible for those on a fixed income without assistance	11/18/2024 10:24 AM
21	Because they aren't open to the public to use!	11/14/2024 8:53 AM
22	Can't afford higher fees. Need financial assistance for children to participate.	11/12/2024 6:14 PM
23	NO. AL is already the highest priced in the county and too much as it is. No sibling discounts makes it hard for large families to participate	11/5/2024 9:24 PM
24	Not really everything is so freaking expensive as is and I am not sure it is all worth it	11/5/2024 9:52 AM
25	No lack of qualified coaching is why we stopped doing all rec sports.	11/1/2024 10:05 AM
26	I'm not sure	10/31/2024 1:28 PM

Q18 Rank the following Town of Archer Lodge initiatives based on your preference for future implementation from 1 (most preferred) to 7 (least preferred):

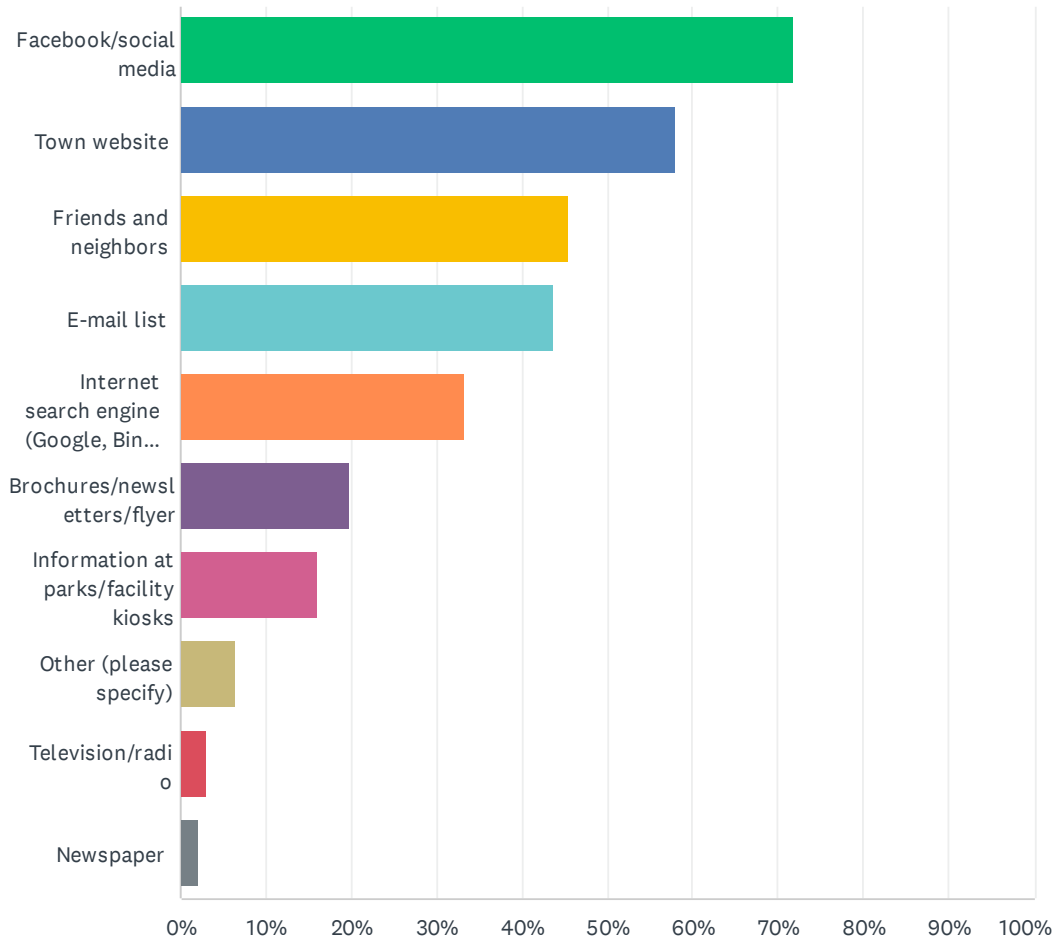
Answered: 231 Skipped: 0



	1	2	3	4	5	6	7	TOTAL	SCORE
Develop more passive recreation (hiking, picnicking, etc.) opportunities	14.72% 34	25.97% 60	29.00% 67	16.88% 39	8.66% 20	4.33% 10	0.43% 1	231	5.06
Improve and enhance existing facilities	20.78% 48	21.65% 50	16.02% 37	16.02% 37	15.58% 36	6.93% 16	3.03% 7	231	4.83
Develop more active recreation (ball fields, soccer etc.) opportunities	25.54% 59	16.88% 39	11.69% 27	12.55% 29	8.66% 20	10.39% 24	14.29% 33	231	4.50
Develop more indoor recreation facilities (community center, gyms, pools etc.)	13.42% 31	15.15% 35	16.88% 39	18.61% 43	9.96% 23	12.55% 29	13.42% 31	231	4.12
Preserve natural areas	16.02% 37	7.79% 18	9.96% 23	12.99% 30	31.60% 73	19.48% 45	2.16% 5	231	3.97
Develop non-motorized trails for walking and biking that connect schools, parks, neighborhoods, and other facilities	9.09% 21	9.96% 23	10.39% 24	12.55% 29	12.55% 29	15.58% 36	29.87% 69	231	3.24
Develop nature and historical or cultural programs	0.43% 1	2.60% 6	6.06% 14	10.39% 24	12.99% 30	30.74% 71	36.80% 85	231	2.28

Q19 How best would you learn about upcoming parks and recreation activities? Please select the top 3 most important to your household:

Answered: 231 Skipped: 0

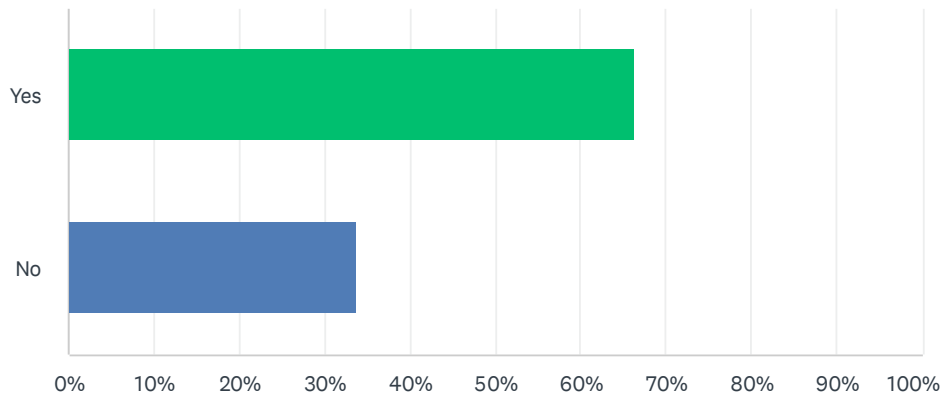


ANSWER CHOICES	RESPONSES	
Facebook/social media	71.86%	166
Town website	58.01%	134
Friends and neighbors	45.45%	105
E-mail list	43.72%	101
Internet search engine (Google, Bing, etc.)	33.33%	77
Brochures/newsletters/flyer	19.91%	46
Information at parks/facility kiosks	16.02%	37
Other (please specify)	6.49%	15
Television/radio	3.03%	7
Newspaper	2.16%	5
Total Respondents: 231		

#	OTHER (PLEASE SPECIFY)	DATE
1	Church, stores	12/18/2024 2:56 PM
2	Community Center dinners	12/11/2024 11:47 AM
3	Not interested	12/11/2024 11:01 AM
4	N/A	12/2/2024 1:06 PM
5	Every door direct postal	11/29/2024 7:20 AM
6	Texting list	11/27/2024 7:25 PM
7	Mail flyer quarterly or biyearly	11/27/2024 1:58 AM
8	Direct mail	11/24/2024 9:12 PM
9	Weekly or Monthly Electronic Newsletter	11/23/2024 7:07 PM
10	I don't have reliable internet, don't do social media, don't take a newspaper, friends all live out of the area, don't watch TV, most of these info methods don't work for me	11/23/2024 6:38 PM
11	Any ways which does not cost the town money to utilize	11/22/2024 5:54 PM
12	Signs along roads, intersections	11/22/2024 5:21 PM
13	Church	11/22/2024 1:39 PM
14	Town website navigation is terrible	11/14/2024 8:11 PM
15	Application Creation	10/31/2024 1:08 PM

Q20 Do you live within the Archer Lodge town limits?

Answered: 231 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	66.23%	153
No	33.77%	78
TOTAL		231

Q21 What is your zip code?

Answered: 231 Skipped: 0

#	RESPONSES	DATE
1	27527	12/18/2024 2:56 PM
2	27591	12/17/2024 9:22 PM
3	27591	12/16/2024 4:38 PM
4	27527	12/16/2024 7:31 AM
5	27527	12/12/2024 2:28 PM
6	27527	12/11/2024 11:47 AM
7	27527	12/11/2024 11:01 AM
8	27527	12/11/2024 7:21 AM
9	27527	12/10/2024 3:07 PM
10	27527	12/9/2024 11:05 PM
11	27527	12/9/2024 12:52 PM
12	27591	12/8/2024 2:52 PM
13	27591	12/5/2024 10:14 AM
14	27527	12/4/2024 7:01 PM
15	27527	12/4/2024 12:43 PM
16	27527	12/2/2024 8:39 PM
17	27527	12/2/2024 1:06 PM
18	27591	12/2/2024 6:52 AM
19	27591	12/1/2024 5:23 PM
20	27527	12/1/2024 4:14 PM
21	27527	12/1/2024 12:05 PM
22	27527	12/1/2024 11:12 AM
23	27527	12/1/2024 9:07 AM
24	27527	12/1/2024 7:23 AM
25	27591	11/30/2024 7:55 PM
26	27591	11/30/2024 2:58 PM
27	27527	11/29/2024 10:38 PM
28	27591	11/29/2024 6:36 PM
29	27591	11/29/2024 2:30 PM
30	27591	11/29/2024 1:19 PM
31	27527	11/29/2024 7:20 AM
32	27527	11/28/2024 2:42 PM
33	27591	11/28/2024 11:34 AM

34	27591	11/28/2024 9:51 AM
35	27591	11/27/2024 8:11 PM
36	27591	11/27/2024 8:05 PM
37	27591	11/27/2024 7:25 PM
38	27591	11/27/2024 11:18 AM
39	27527	11/27/2024 11:09 AM
40	27527	11/27/2024 9:12 AM
41	27527	11/27/2024 1:58 AM
42	27527	11/26/2024 8:06 PM
43	27591	11/26/2024 7:05 PM
44	27527	11/26/2024 7:04 PM
45	27527	11/26/2024 6:32 PM
46	27527	11/26/2024 5:08 PM
47	27591	11/26/2024 3:35 PM
48	27527	11/26/2024 3:11 PM
49	27591	11/26/2024 2:35 PM
50	27527	11/26/2024 1:01 PM
51	27527	11/26/2024 7:15 AM
52	27527	11/25/2024 9:57 PM
53	27527	11/25/2024 9:48 PM
54	27527	11/25/2024 9:18 PM
55	27527	11/25/2024 8:21 PM
56	27591	11/25/2024 3:06 PM
57	27591	11/25/2024 3:03 PM
58	27591	11/25/2024 12:53 PM
59	27527	11/25/2024 9:20 AM
60	27591	11/25/2024 8:08 AM
61	27591	11/25/2024 7:29 AM
62	27591	11/24/2024 9:12 PM
63	27591	11/24/2024 8:58 PM
64	27591	11/24/2024 6:51 PM
65	27527	11/24/2024 1:25 PM
66	27591	11/24/2024 12:57 PM
67	27527	11/24/2024 11:04 AM
68	27591	11/24/2024 9:20 AM
69	27527	11/24/2024 6:29 AM
70	27527	11/24/2024 6:27 AM
71	27527	11/24/2024 4:33 AM

72	27527	11/23/2024 8:44 PM
73	27527	11/23/2024 7:28 PM
74	27527	11/23/2024 7:07 PM
75	27527	11/23/2024 6:38 PM
76	27591	11/23/2024 5:44 PM
77	27591	11/23/2024 5:29 PM
78	27527	11/23/2024 4:46 PM
79	27527	11/23/2024 4:05 PM
80	27591	11/23/2024 2:14 PM
81	27527	11/23/2024 1:52 PM
82	27527	11/23/2024 1:32 PM
83	27527	11/23/2024 1:26 PM
84	27591	11/23/2024 12:21 PM
85	27591	11/23/2024 11:51 AM
86	27591	11/23/2024 11:43 AM
87	27591	11/23/2024 11:16 AM
88	27527	11/23/2024 11:05 AM
89	27527	11/23/2024 10:26 AM
90	27527	11/23/2024 10:22 AM
91	27527	11/23/2024 10:10 AM
92	27527	11/23/2024 10:00 AM
93	27591	11/23/2024 9:25 AM
94	27591	11/23/2024 7:26 AM
95	27527	11/23/2024 7:14 AM
96	27591	11/23/2024 5:03 AM
97	27527	11/22/2024 10:31 PM
98	27591	11/22/2024 8:25 PM
99	27591	11/22/2024 7:20 PM
100	27591	11/22/2024 7:20 PM
101	27527	11/22/2024 7:16 PM
102	27527	11/22/2024 6:41 PM
103	Really	11/22/2024 6:30 PM
104	27527	11/22/2024 6:27 PM
105	27527	11/22/2024 6:25 PM
106	27591	11/22/2024 5:54 PM
107	27527	11/22/2024 5:53 PM
108	27527	11/22/2024 5:37 PM
109	27527	11/22/2024 5:21 PM

110	27591	11/22/2024 5:19 PM
111	27527	11/22/2024 5:14 PM
112	27527	11/22/2024 5:08 PM
113	27527	11/22/2024 4:57 PM
114	27527	11/22/2024 4:53 PM
115	27591	11/22/2024 4:45 PM
116	27591	11/22/2024 4:22 PM
117	27527	11/22/2024 4:21 PM
118	27527	11/22/2024 3:53 PM
119	27527	11/22/2024 3:39 PM
120	27527	11/22/2024 3:23 PM
121	27527	11/22/2024 2:45 PM
122	27527	11/22/2024 2:09 PM
123	27591	11/22/2024 1:39 PM
124	27527	11/22/2024 12:30 PM
125	27591	11/21/2024 12:27 PM
126	27527	11/19/2024 9:22 PM
127	27591	11/18/2024 10:24 AM
128	27527	11/18/2024 8:21 AM
129	27527	11/17/2024 11:02 AM
130	27527	11/16/2024 8:29 AM
131	27527	11/15/2024 5:30 PM
132	27527	11/15/2024 4:05 PM
133	27527	11/15/2024 2:32 PM
134	27527	11/15/2024 12:59 PM
135	27527	11/15/2024 11:34 AM
136	27527	11/15/2024 9:12 AM
137	27591	11/15/2024 8:17 AM
138	27591	11/15/2024 7:15 AM
139	27527	11/15/2024 6:04 AM
140	27527	11/14/2024 11:49 PM
141	27591	11/14/2024 11:34 PM
142	27591	11/14/2024 11:10 PM
143	27527	11/14/2024 8:11 PM
144	27527	11/14/2024 8:11 PM
145	27527	11/14/2024 11:49 AM
146	27527	11/14/2024 8:53 AM
147	27591	11/13/2024 8:01 PM

148	27527	11/12/2024 10:23 PM
149	27591	11/12/2024 6:14 PM
150	27527	11/12/2024 5:38 PM
151	27527	11/11/2024 3:44 PM
152	27545	11/10/2024 1:50 PM
153	27527	11/10/2024 1:36 PM
154	27527	11/8/2024 3:32 PM
155	27527	11/7/2024 9:08 AM
156	27527	11/7/2024 7:09 AM
157	27527	11/6/2024 10:19 PM
158	27527	11/6/2024 8:30 PM
159	27527	11/6/2024 8:06 PM
160	27520	11/6/2024 7:58 PM
161	27591	11/6/2024 9:50 AM
162	27527	11/6/2024 7:06 AM
163	27527	11/5/2024 9:24 PM
164	27527	11/5/2024 8:32 PM
165	27527	11/5/2024 4:50 PM
166	27591	11/5/2024 3:55 PM
167	27591	11/5/2024 3:48 PM
168	27527	11/5/2024 3:25 PM
169	27527	11/5/2024 12:58 PM
170	27527	11/5/2024 12:55 PM
171	27527	11/5/2024 12:40 PM
172	27591	11/5/2024 12:11 PM
173	27591	11/5/2024 11:53 AM
174	27527	11/5/2024 11:24 AM
175	27527	11/5/2024 11:20 AM
176	27527	11/5/2024 10:44 AM
177	27527	11/5/2024 10:41 AM
178	27527	11/5/2024 10:36 AM
179	27527	11/5/2024 10:30 AM
180	27610	11/5/2024 10:29 AM
181	27527	11/5/2024 10:29 AM
182	27591	11/5/2024 10:27 AM
183	27527	11/5/2024 10:22 AM
184	27520	11/5/2024 10:04 AM
185	27527	11/5/2024 10:02 AM

186	27527	11/5/2024 9:57 AM
187	27527	11/5/2024 9:56 AM
188	27520	11/5/2024 9:54 AM
189	27527	11/5/2024 9:52 AM
190	27527	11/5/2024 9:50 AM
191	27527	11/5/2024 9:37 AM
192	27527	11/5/2024 9:31 AM
193	27527	11/5/2024 9:22 AM
194	27591	11/5/2024 9:20 AM
195	27520	11/5/2024 9:18 AM
196	27527	11/5/2024 9:16 AM
197	27527	11/5/2024 9:15 AM
198	27577	11/5/2024 9:14 AM
199	27527	11/5/2024 9:14 AM
200	27527	11/4/2024 10:16 PM
201	27527	11/4/2024 8:42 PM
202	27520	11/4/2024 7:24 PM
203	27527	11/4/2024 5:02 PM
204	27597	11/4/2024 4:19 PM
205	27527	11/4/2024 1:45 PM
206	27527	11/3/2024 9:25 PM
207	27527	11/3/2024 7:24 PM
208	27527	11/3/2024 2:51 PM
209	27527	11/3/2024 1:37 PM
210	27591	11/3/2024 1:22 PM
211	27591	11/3/2024 1:04 PM
212	27591	11/2/2024 9:36 PM
213	27527	11/2/2024 12:22 AM
214	27527	11/1/2024 11:41 PM
215	27527	11/1/2024 10:16 PM
216	27527	11/1/2024 1:38 PM
217	27527	11/1/2024 10:05 AM
218	27527	11/1/2024 9:51 AM
219	27527	11/1/2024 9:46 AM
220	27527	11/1/2024 9:21 AM
221	27527	10/31/2024 9:41 PM
222	27591	10/31/2024 8:58 PM
223	27591	10/31/2024 2:54 PM

224	27591	10/31/2024 2:39 PM
225	27527	10/31/2024 2:37 PM
226	27591	10/31/2024 1:59 PM
227	27527	10/31/2024 1:33 PM
228	27591	10/31/2024 1:28 PM
229	27527	10/31/2024 1:20 PM
230	27576	10/31/2024 1:13 PM
231	27527	10/31/2024 1:08 PM

Q22 How many years have you lived in Archer Lodge?

Answered: 231 Skipped: 0

#	RESPONSES	DATE
1	12 years	12/18/2024 2:56 PM
2	8	12/17/2024 9:22 PM
3	5	12/16/2024 4:38 PM
4	30	12/16/2024 7:31 AM
5	23	12/12/2024 2:28 PM
6	6.5	12/11/2024 11:47 AM
7	57	12/11/2024 11:01 AM
8	3	12/11/2024 7:21 AM
9	2 1/2	12/10/2024 3:07 PM
10	45	12/9/2024 11:05 PM
11	8	12/9/2024 12:52 PM
12	1	12/8/2024 2:52 PM
13	14 years. October 2009	12/5/2024 10:14 AM
14	3	12/4/2024 7:01 PM
15	16	12/4/2024 12:43 PM
16	6	12/2/2024 8:39 PM
17	+20	12/2/2024 1:06 PM
18	24	12/2/2024 6:52 AM
19	4 years	12/1/2024 5:23 PM
20	28 yrs	12/1/2024 4:14 PM
21	5	12/1/2024 12:05 PM
22	17	12/1/2024 11:12 AM
23	4	12/1/2024 9:07 AM
24	5	12/1/2024 7:23 AM
25	9	11/30/2024 7:55 PM
26	8	11/30/2024 2:58 PM
27	24 yrs	11/29/2024 10:38 PM
28	19	11/29/2024 6:36 PM
29	15	11/29/2024 2:30 PM
30	3	11/29/2024 1:19 PM
31	8years	11/29/2024 7:20 AM
32	28	11/28/2024 2:42 PM
33	Just moved here. I am less then a mile from the town border	11/28/2024 11:34 AM

34	50	11/28/2024 9:51 AM
35	19	11/27/2024 8:11 PM
36	19	11/27/2024 8:05 PM
37	4	11/27/2024 7:25 PM
38	9	11/27/2024 11:18 AM
39	36	11/27/2024 11:09 AM
40	7 years	11/27/2024 9:12 AM
41	4.5	11/27/2024 1:58 AM
42	2	11/26/2024 8:06 PM
43	8	11/26/2024 7:05 PM
44	8	11/26/2024 7:04 PM
45	3months	11/26/2024 6:32 PM
46	5	11/26/2024 5:08 PM
47	11	11/26/2024 3:35 PM
48	6	11/26/2024 3:11 PM
49	4	11/26/2024 2:35 PM
50	26	11/26/2024 1:01 PM
51	3	11/26/2024 7:15 AM
52	2	11/25/2024 9:57 PM
53	1	11/25/2024 9:48 PM
54	28	11/25/2024 9:18 PM
55	3	11/25/2024 8:21 PM
56	24	11/25/2024 3:06 PM
57	18	11/25/2024 3:03 PM
58	10	11/25/2024 12:53 PM
59	3	11/25/2024 9:20 AM
60	4	11/25/2024 8:08 AM
61	3	11/25/2024 7:29 AM
62	27	11/24/2024 9:12 PM
63	8	11/24/2024 8:58 PM
64	18	11/24/2024 6:51 PM
65	15	11/24/2024 1:25 PM
66	9	11/24/2024 12:57 PM
67	5	11/24/2024 11:04 AM
68	13 years	11/24/2024 9:20 AM
69	9	11/24/2024 6:29 AM
70	9	11/24/2024 6:27 AM
71	21	11/24/2024 4:33 AM

72	0	11/23/2024 8:44 PM
73	7	11/23/2024 7:28 PM
74	22	11/23/2024 7:07 PM
75	33	11/23/2024 6:38 PM
76	10	11/23/2024 5:44 PM
77	10	11/23/2024 5:29 PM
78	24	11/23/2024 4:46 PM
79	8	11/23/2024 4:05 PM
80	25 years	11/23/2024 2:14 PM
81	13	11/23/2024 1:52 PM
82	5	11/23/2024 1:32 PM
83	2	11/23/2024 1:26 PM
84	N/A	11/23/2024 12:21 PM
85	0	11/23/2024 11:51 AM
86	1	11/23/2024 11:43 AM
87	18	11/23/2024 11:16 AM
88	10	11/23/2024 11:05 AM
89	15	11/23/2024 10:26 AM
90	10	11/23/2024 10:22 AM
91	15	11/23/2024 10:10 AM
92	13	11/23/2024 10:00 AM
93	30	11/23/2024 9:25 AM
94	30	11/23/2024 7:26 AM
95	25 years	11/23/2024 7:14 AM
96	6	11/23/2024 5:03 AM
97	7	11/22/2024 10:31 PM
98	24 yrs	11/22/2024 8:25 PM
99	4	11/22/2024 7:20 PM
100	16	11/22/2024 7:20 PM
101	18	11/22/2024 7:16 PM
102	60	11/22/2024 6:41 PM
103	40	11/22/2024 6:30 PM
104	2	11/22/2024 6:27 PM
105	26	11/22/2024 6:25 PM
106	8	11/22/2024 5:54 PM
107	7	11/22/2024 5:53 PM
108	10	11/22/2024 5:37 PM
109	4	11/22/2024 5:21 PM

110	16	11/22/2024 5:19 PM
111	15	11/22/2024 5:14 PM
112	28	11/22/2024 5:08 PM
113	7	11/22/2024 4:57 PM
114	25	11/22/2024 4:53 PM
115	20	11/22/2024 4:45 PM
116	20	11/22/2024 4:22 PM
117	6	11/22/2024 4:21 PM
118	10	11/22/2024 3:53 PM
119	4	11/22/2024 3:39 PM
120	15	11/22/2024 3:23 PM
121	5	11/22/2024 2:45 PM
122	6	11/22/2024 2:09 PM
123	18	11/22/2024 1:39 PM
124	5	11/22/2024 12:30 PM
125	0	11/21/2024 12:27 PM
126	8	11/19/2024 9:22 PM
127	18	11/18/2024 10:24 AM
128	60	11/18/2024 8:21 AM
129	3	11/17/2024 11:02 AM
130	5	11/16/2024 8:29 AM
131	7	11/15/2024 5:30 PM
132	4.5	11/15/2024 4:05 PM
133	6	11/15/2024 2:32 PM
134	3	11/15/2024 12:59 PM
135	54	11/15/2024 11:34 AM
136	8	11/15/2024 9:12 AM
137	7 years adjacent	11/15/2024 8:17 AM
138	4	11/15/2024 7:15 AM
139	6	11/15/2024 6:04 AM
140	4	11/14/2024 11:49 PM
141	55	11/14/2024 11:34 PM
142	None in Archer Lodge but over 60 in surrounding area	11/14/2024 11:10 PM
143	63	11/14/2024 8:11 PM
144	35	11/14/2024 8:11 PM
145	8	11/14/2024 11:49 AM
146	18	11/14/2024 8:53 AM
147	26	11/13/2024 8:01 PM

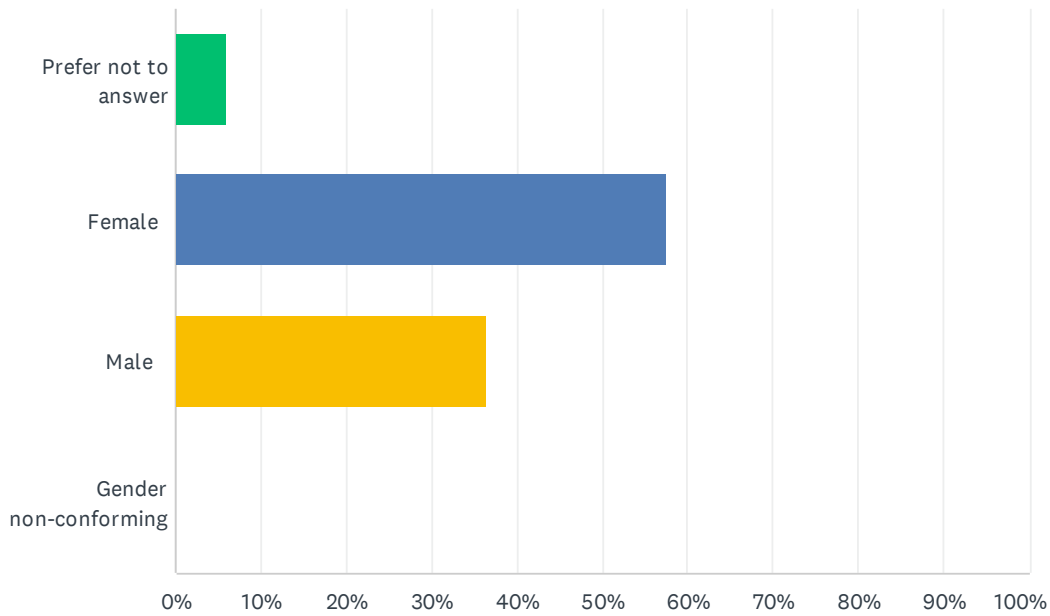
148	3 months	11/12/2024 10:23 PM
149	19	11/12/2024 6:14 PM
150	8	11/12/2024 5:38 PM
151	17	11/11/2024 3:44 PM
152	0	11/10/2024 1:50 PM
153	7	11/10/2024 1:36 PM
154	20	11/8/2024 3:32 PM
155	n/a	11/7/2024 9:08 AM
156	7	11/7/2024 7:09 AM
157	9	11/6/2024 10:19 PM
158	19 years	11/6/2024 8:30 PM
159	6	11/6/2024 8:06 PM
160	0	11/6/2024 7:58 PM
161	4	11/6/2024 9:50 AM
162	5	11/6/2024 7:06 AM
163	22	11/5/2024 9:24 PM
164	9	11/5/2024 8:32 PM
165	0	11/5/2024 4:50 PM
166	0	11/5/2024 3:55 PM
167	4	11/5/2024 3:48 PM
168	14	11/5/2024 3:25 PM
169	8	11/5/2024 12:58 PM
170	13	11/5/2024 12:55 PM
171	less than a year	11/5/2024 12:40 PM
172	21	11/5/2024 12:11 PM
173	5	11/5/2024 11:53 AM
174	8	11/5/2024 11:24 AM
175	10	11/5/2024 11:20 AM
176	0	11/5/2024 10:44 AM
177	5 years	11/5/2024 10:41 AM
178	0	11/5/2024 10:36 AM
179	11	11/5/2024 10:30 AM
180	0	11/5/2024 10:29 AM
181	5	11/5/2024 10:29 AM
182	3	11/5/2024 10:27 AM
183	10	11/5/2024 10:22 AM
184	16	11/5/2024 10:04 AM
185	12	11/5/2024 10:02 AM

186	3	11/5/2024 9:57 AM
187	7	11/5/2024 9:56 AM
188	0	11/5/2024 9:54 AM
189	6 years	11/5/2024 9:52 AM
190	15	11/5/2024 9:50 AM
191	0	11/5/2024 9:37 AM
192	0	11/5/2024 9:31 AM
193	17	11/5/2024 9:22 AM
194	15	11/5/2024 9:20 AM
195	0	11/5/2024 9:18 AM
196	3	11/5/2024 9:16 AM
197	0	11/5/2024 9:15 AM
198	0	11/5/2024 9:14 AM
199	11	11/5/2024 9:14 AM
200	7 years	11/4/2024 10:16 PM
201	40	11/4/2024 8:42 PM
202	0	11/4/2024 7:24 PM
203	3	11/4/2024 5:02 PM
204	None	11/4/2024 4:19 PM
205	28	11/4/2024 1:45 PM
206	3	11/3/2024 9:25 PM
207	13	11/3/2024 7:24 PM
208	9	11/3/2024 2:51 PM
209	6	11/3/2024 1:37 PM
210	1	11/3/2024 1:22 PM
211	ive lived less than 2 milea from archer lodge limits for 14yrs	11/3/2024 1:04 PM
212	8 years	11/2/2024 9:36 PM
213	7	11/2/2024 12:22 AM
214	6	11/1/2024 11:41 PM
215	2	11/1/2024 10:16 PM
216	3	11/1/2024 1:38 PM
217	5.5	11/1/2024 10:05 AM
218	15	11/1/2024 9:51 AM
219	6 years	11/1/2024 9:46 AM
220	2.5	11/1/2024 9:21 AM
221	0	10/31/2024 9:41 PM
222	17	10/31/2024 8:58 PM
223	10	10/31/2024 2:54 PM

224	18	10/31/2024 2:39 PM
225	37	10/31/2024 2:37 PM
226	10	10/31/2024 1:59 PM
227	3	10/31/2024 1:33 PM
228	4	10/31/2024 1:28 PM
229	3	10/31/2024 1:20 PM
230	5	10/31/2024 1:13 PM
231	28	10/31/2024 1:08 PM

Q23 What is your gender?

Answered: 231 Skipped: 0

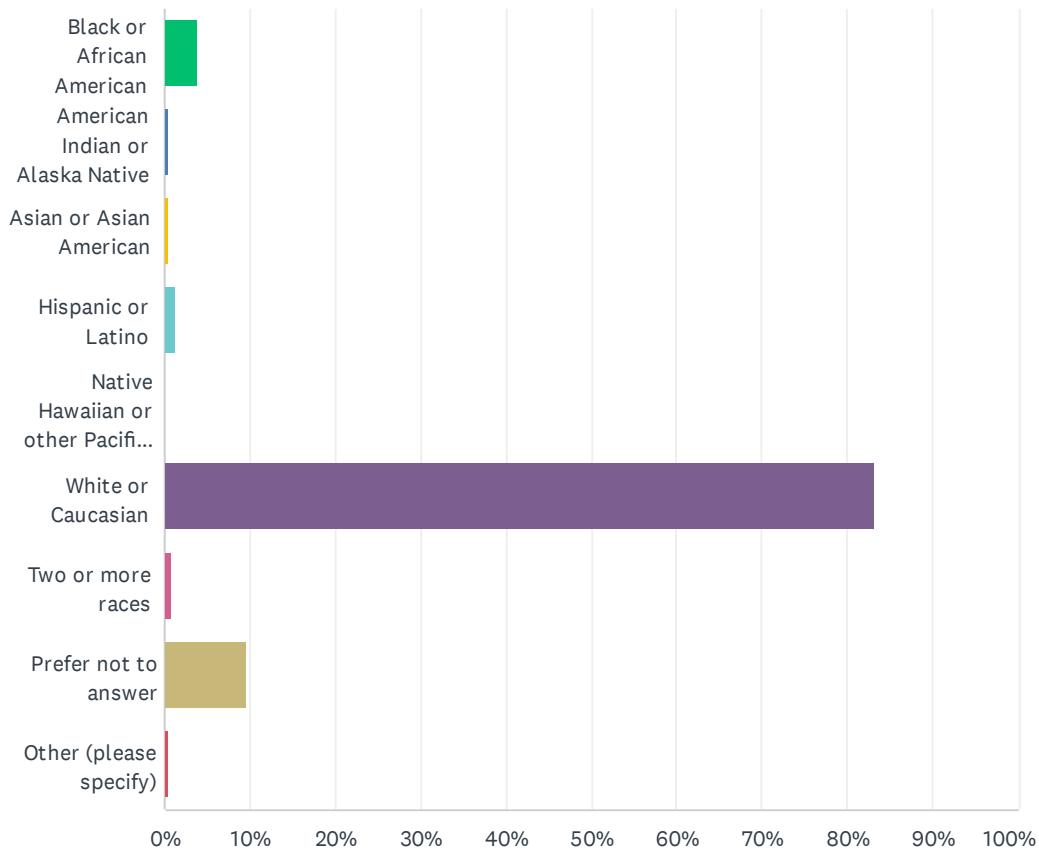


ANSWER CHOICES	RESPONSES
Prefer not to answer	6.06% 14
Female	57.58% 133
Male	36.36% 84
Gender non-conforming	0.00% 0
TOTAL	231

#	PREFER TO SELF-DESCRIBE	DATE
1	Female	12/1/2024 5:23 PM
2	Please 2 genders only	11/15/2024 5:30 PM
3	Why does this even matter	11/1/2024 10:05 AM

Q24 What is your race/ethnicity?

Answered: 231 Skipped: 0

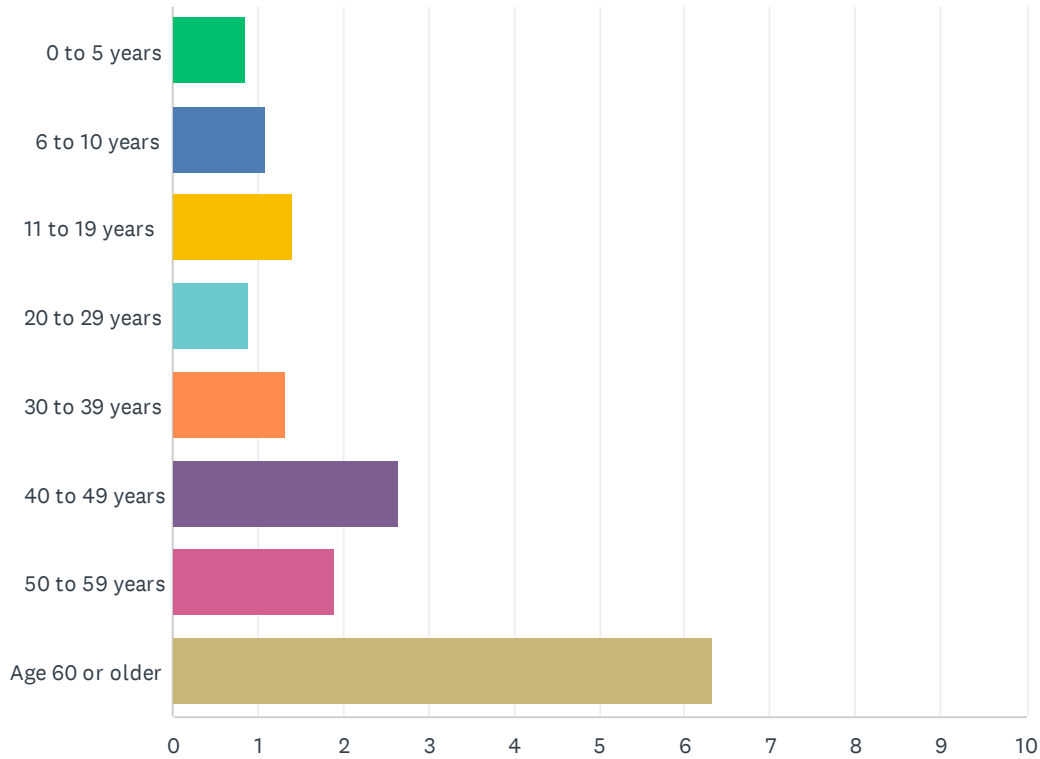


ANSWER CHOICES	RESPONSES
Black or African American	3.90% 9
American Indian or Alaska Native	0.43% 1
Asian or Asian American	0.43% 1
Hispanic or Latino	1.30% 3
Native Hawaiian or other Pacific Islander	0.00% 0
White or Caucasian	83.12% 192
Two or more races	0.87% 2
Prefer not to answer	9.52% 22
Other (please specify)	0.43% 1
TOTAL	231

#	OTHER (PLEASE SPECIFY)	DATE
1	I belong to the human race, all other racial divisions are racist	11/23/2024 6:38 PM

Q25 List the number of persons in your household including yourself who are in the age brackets below:

Answered: 231 Skipped: 0



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
0 to 5 years	1	56	66
6 to 10 years	1	94	86
11 to 19 years	1	150	106
20 to 29 years	1	47	53
30 to 39 years	1	105	79
40 to 49 years	3	283	107
50 to 59 years	2	129	68
Age 60 or older	6	513	81
Total Respondents: 231			

#	0 TO 5 YEARS	DATE
1	1	12/17/2024 9:22 PM
2	2	12/12/2024 2:28 PM
3	2	12/11/2024 7:21 AM

4	0	12/10/2024 3:07 PM
5	1	12/8/2024 2:52 PM
6	0	12/2/2024 1:06 PM
7	0	12/1/2024 7:23 AM
8	1	11/30/2024 2:58 PM
9	0	11/29/2024 6:36 PM
10	0	11/27/2024 8:11 PM
11	1	11/27/2024 7:25 PM
12	1	11/26/2024 6:32 PM
13	0	11/25/2024 9:18 PM
14	1	11/25/2024 7:29 AM
15	1	11/24/2024 6:51 PM
16	1	11/24/2024 11:04 AM
17	0	11/23/2024 6:38 PM
18	1	11/23/2024 5:29 PM
19	0	11/23/2024 2:14 PM
20	2	11/23/2024 1:32 PM
21	0	11/23/2024 11:51 AM
22	0	11/23/2024 11:05 AM
23	1	11/23/2024 7:26 AM
24	2	11/22/2024 10:31 PM
25	1	11/22/2024 5:53 PM
26	0	11/22/2024 5:19 PM
27	1	11/22/2024 5:14 PM
28	1	11/22/2024 4:57 PM
29	1	11/22/2024 4:21 PM
30	2	11/22/2024 3:23 PM
31	0	11/22/2024 2:09 PM
32	1	11/22/2024 12:30 PM
33	1	11/19/2024 9:22 PM
34	1	11/15/2024 12:59 PM
35	1	11/15/2024 8:17 AM
36	0	11/15/2024 7:15 AM
37	2	11/15/2024 6:04 AM
38	1	11/14/2024 11:49 PM
39	1	11/14/2024 8:11 PM
40	1	11/14/2024 11:49 AM
41	1	11/13/2024 8:01 PM

42	0	11/12/2024 5:38 PM
43	2	11/10/2024 1:50 PM
44	0	11/6/2024 7:58 PM
45	0	11/5/2024 8:32 PM
46	0	11/5/2024 12:11 PM
47	0	11/5/2024 11:53 AM
48	1	11/5/2024 10:41 AM
49	2	11/5/2024 10:29 AM
50	0	11/5/2024 10:27 AM
51	2	11/5/2024 10:22 AM
52	1	11/5/2024 10:04 AM
53	2	11/5/2024 9:37 AM
54	0	11/5/2024 9:20 AM
55	1	11/5/2024 9:15 AM
56	1	11/5/2024 9:14 AM
57	2	11/3/2024 1:37 PM
58	1	11/3/2024 1:22 PM
59	1	11/2/2024 9:36 PM
60	1	10/31/2024 9:41 PM
61	0	10/31/2024 2:54 PM
62	1	10/31/2024 1:59 PM
63	1	10/31/2024 1:33 PM
64	0	10/31/2024 1:28 PM
65	1	10/31/2024 1:20 PM
66	2	10/31/2024 1:13 PM
#	6 TO 10 YEARS	DATE
1	1	12/17/2024 9:22 PM
2	0	12/10/2024 3:07 PM
3	2	12/9/2024 12:52 PM
4	1	12/4/2024 7:01 PM
5	0	12/2/2024 1:06 PM
6	1	12/1/2024 12:05 PM
7	0	12/1/2024 7:23 AM
8	1	11/30/2024 7:55 PM
9	2	11/30/2024 2:58 PM
10	0	11/29/2024 6:36 PM
11	0	11/27/2024 8:11 PM
12	1	11/27/2024 9:12 AM

13	2	11/27/2024 1:58 AM
14	0	11/25/2024 9:18 PM
15	1	11/25/2024 8:21 PM
16	1	11/23/2024 8:44 PM
17	1	11/23/2024 7:28 PM
18	0	11/23/2024 6:38 PM
19	0	11/23/2024 2:14 PM
20	0	11/23/2024 11:51 AM
21	2	11/23/2024 11:43 AM
22	1	11/23/2024 11:05 AM
23	1	11/23/2024 10:00 AM
24	2	11/23/2024 7:26 AM
25	1	11/22/2024 10:31 PM
26	2	11/22/2024 6:27 PM
27	1	11/22/2024 5:53 PM
28	0	11/22/2024 5:19 PM
29	1	11/22/2024 4:57 PM
30	1	11/22/2024 4:45 PM
31	2	11/22/2024 3:23 PM
32	1	11/22/2024 2:45 PM
33	0	11/22/2024 2:09 PM
34	1	11/22/2024 1:39 PM
35	1	11/22/2024 12:30 PM
36	1	11/19/2024 9:22 PM
37	1	11/18/2024 10:24 AM
38	1	11/16/2024 8:29 AM
39	1	11/15/2024 2:32 PM
40	0	11/15/2024 7:15 AM
41	1	11/13/2024 8:01 PM
42	1	11/12/2024 6:14 PM
43	2	11/12/2024 5:38 PM
44	1	11/8/2024 3:32 PM
45	2	11/7/2024 9:08 AM
46	2	11/6/2024 10:19 PM
47	1	11/6/2024 7:58 PM
48	2	11/6/2024 7:06 AM
49	1	11/5/2024 9:24 PM
50	3	11/5/2024 8:32 PM

51	3	11/5/2024 3:55 PM
52	1	11/5/2024 3:48 PM
53	1	11/5/2024 12:58 PM
54	1	11/5/2024 12:40 PM
55	0	11/5/2024 12:11 PM
56	0	11/5/2024 11:53 AM
57	2	11/5/2024 11:24 AM
58	1	11/5/2024 10:30 AM
59	1	11/5/2024 10:29 AM
60	1	11/5/2024 10:29 AM
61	1	11/5/2024 10:27 AM
62	1	11/5/2024 10:22 AM
63	0	11/5/2024 10:04 AM
64	2	11/5/2024 10:02 AM
65	1	11/5/2024 9:57 AM
66	2	11/5/2024 9:54 AM
67	2	11/5/2024 9:52 AM
68	1	11/5/2024 9:20 AM
69	1	11/5/2024 9:18 AM
70	1	11/5/2024 9:16 AM
71	1	11/5/2024 9:15 AM
72	1	11/5/2024 9:14 AM
73	2	11/5/2024 9:14 AM
74	1	11/4/2024 7:24 PM
75	1	11/4/2024 5:02 PM
76	1	11/4/2024 4:19 PM
77	2	11/3/2024 9:25 PM
78	1	11/3/2024 7:24 PM
79	1	11/3/2024 1:04 PM
80	1	11/2/2024 12:22 AM
81	1	11/1/2024 10:16 PM
82	1	11/1/2024 9:51 AM
83	2	11/1/2024 9:21 AM
84	1	10/31/2024 2:54 PM
85	2	10/31/2024 1:28 PM
86	1	10/31/2024 1:20 PM
#	11 TO 19 YEARS	DATE
1	1	12/17/2024 9:22 PM

2	0	12/10/2024 3:07 PM
3	1	12/9/2024 12:52 PM
4	0	12/2/2024 1:06 PM
5	1	12/1/2024 12:05 PM
6	2	12/1/2024 11:12 AM
7	0	12/1/2024 7:23 AM
8	2	11/30/2024 7:55 PM
9	0	11/29/2024 6:36 PM
10	1	11/29/2024 2:30 PM
11	1	11/29/2024 7:20 AM
12	0	11/27/2024 8:11 PM
13	3	11/27/2024 9:12 AM
14	2	11/27/2024 1:58 AM
15	2	11/26/2024 8:06 PM
16	2	11/26/2024 7:05 PM
17	2	11/26/2024 7:04 PM
18	2	11/26/2024 3:35 PM
19	1	11/26/2024 3:11 PM
20	3	11/26/2024 2:35 PM
21	0	11/25/2024 9:18 PM
22	1	11/25/2024 8:21 PM
23	1	11/25/2024 3:06 PM
24	1	11/25/2024 3:03 PM
25	3	11/25/2024 9:20 AM
26	2	11/24/2024 8:58 PM
27	1	11/24/2024 1:25 PM
28	1	11/23/2024 7:28 PM
29	0	11/23/2024 6:38 PM
30	0	11/23/2024 2:14 PM
31	1	11/23/2024 1:52 PM
32	0	11/23/2024 11:51 AM
33	0	11/23/2024 11:05 AM
34	2	11/23/2024 10:26 AM
35	1	11/23/2024 10:00 AM
36	1	11/22/2024 10:31 PM
37	2	11/22/2024 7:16 PM
38	3	11/22/2024 6:27 PM
39	1	11/22/2024 5:54 PM

40	1	11/22/2024 5:37 PM
41	3	11/22/2024 5:21 PM
42	1	11/22/2024 5:19 PM
43	2	11/22/2024 4:45 PM
44	2	11/22/2024 4:22 PM
45	2	11/22/2024 3:53 PM
46	1	11/22/2024 3:23 PM
47	2	11/22/2024 2:45 PM
48	0	11/22/2024 2:09 PM
49	2	11/22/2024 12:30 PM
50	1	11/21/2024 12:27 PM
51	0	11/19/2024 9:22 PM
52	1	11/16/2024 8:29 AM
53	2	11/15/2024 4:05 PM
54	1	11/15/2024 12:59 PM
55	1	11/15/2024 9:12 AM
56	0	11/15/2024 7:15 AM
57	2	11/14/2024 8:53 AM
58	1	11/13/2024 8:01 PM
59	1	11/12/2024 5:38 PM
60	3	11/10/2024 1:36 PM
61	1	11/8/2024 3:32 PM
62	2	11/7/2024 9:08 AM
63	2	11/7/2024 7:09 AM
64	1	11/6/2024 10:19 PM
65	2	11/6/2024 8:30 PM
66	1	11/6/2024 8:06 PM
67	1	11/6/2024 7:58 PM
68	1	11/6/2024 9:50 AM
69	1	11/6/2024 7:06 AM
70	1	11/5/2024 9:24 PM
71	2	11/5/2024 8:32 PM
72	3	11/5/2024 3:25 PM
73	4	11/5/2024 12:58 PM
74	2	11/5/2024 12:55 PM
75	1	11/5/2024 12:40 PM
76	2	11/5/2024 12:11 PM
77	1	11/5/2024 11:53 AM

78	2	11/5/2024 11:20 AM
79	2	11/5/2024 10:44 AM
80	2	11/5/2024 10:41 AM
81	1	11/5/2024 10:30 AM
82	1	11/5/2024 10:29 AM
83	3	11/5/2024 10:27 AM
84	1	11/5/2024 10:22 AM
85	0	11/5/2024 10:04 AM
86	3	11/5/2024 9:52 AM
87	2	11/5/2024 9:50 AM
88	1	11/5/2024 9:22 AM
89	1	11/5/2024 9:20 AM
90	1	11/5/2024 9:18 AM
91	1	11/5/2024 9:16 AM
92	2	11/5/2024 9:15 AM
93	4	11/4/2024 10:16 PM
94	1	11/4/2024 1:45 PM
95	1	11/3/2024 7:24 PM
96	2	11/3/2024 2:51 PM
97	2	11/3/2024 1:04 PM
98	2	11/2/2024 12:22 AM
99	2	11/1/2024 11:41 PM
100	2	11/1/2024 10:16 PM
101	2	11/1/2024 10:05 AM
102	1	11/1/2024 9:51 AM
103	2	11/1/2024 9:46 AM
104	0	10/31/2024 2:54 PM
105	2	10/31/2024 2:39 PM
106	0	10/31/2024 1:28 PM
#	20 TO 29 YEARS	DATE
1	1	12/16/2024 7:31 AM
2	1	12/11/2024 11:01 AM
3	0	12/10/2024 3:07 PM
4	2	12/8/2024 2:52 PM
5	0	12/2/2024 1:06 PM
6	0	12/1/2024 7:23 AM
7	1	11/29/2024 10:38 PM
8	0	11/29/2024 6:36 PM

9	1	11/29/2024 2:30 PM
10	0	11/27/2024 8:11 PM
11	1	11/27/2024 7:25 PM
12	1	11/27/2024 11:18 AM
13	4	11/26/2024 1:01 PM
14	2	11/25/2024 9:57 PM
15	0	11/25/2024 9:18 PM
16	1	11/25/2024 12:53 PM
17	1	11/25/2024 7:29 AM
18	2	11/24/2024 6:51 PM
19	1	11/24/2024 1:25 PM
20	0	11/23/2024 6:38 PM
21	2	11/23/2024 5:29 PM
22	1	11/23/2024 2:14 PM
23	2	11/23/2024 1:52 PM
24	0	11/23/2024 11:51 AM
25	1	11/23/2024 11:43 AM
26	0	11/23/2024 11:05 AM
27	1	11/23/2024 10:26 AM
28	1	11/23/2024 10:22 AM
29	2	11/23/2024 7:14 AM
30	2	11/22/2024 7:16 PM
31	1	11/22/2024 5:37 PM
32	1	11/22/2024 5:19 PM
33	2	11/22/2024 5:14 PM
34	1	11/22/2024 3:39 PM
35	0	11/22/2024 2:09 PM
36	1	11/22/2024 1:39 PM
37	0	11/19/2024 9:22 PM
38	1	11/18/2024 10:24 AM
39	0	11/15/2024 7:15 AM
40	1	11/14/2024 11:34 PM
41	1	11/12/2024 6:14 PM
42	0	11/12/2024 5:38 PM
43	0	11/5/2024 8:32 PM
44	0	11/5/2024 12:11 PM
45	2	11/5/2024 11:53 AM
46	0	11/5/2024 10:04 AM

47	1	11/5/2024 9:22 AM
48	0	11/5/2024 9:20 AM
49	2	11/4/2024 1:45 PM
50	1	11/3/2024 1:37 PM
51	0	10/31/2024 2:54 PM
52	1	10/31/2024 1:33 PM
53	0	10/31/2024 1:28 PM
#	30 TO 39 YEARS	DATE
1	2	12/16/2024 4:38 PM
2	2	12/12/2024 2:28 PM
3	2	12/11/2024 7:21 AM
4	0	12/10/2024 3:07 PM
5	2	12/4/2024 7:01 PM
6	0	12/2/2024 1:06 PM
7	0	12/1/2024 7:23 AM
8	2	11/30/2024 7:55 PM
9	2	11/30/2024 2:58 PM
10	0	11/29/2024 6:36 PM
11	0	11/27/2024 8:11 PM
12	1	11/27/2024 7:25 PM
13	1	11/27/2024 9:12 AM
14	2	11/27/2024 1:58 AM
15	1	11/26/2024 3:35 PM
16	2	11/25/2024 9:48 PM
17	0	11/25/2024 9:18 PM
18	1	11/25/2024 9:20 AM
19	2	11/25/2024 8:08 AM
20	1	11/25/2024 7:29 AM
21	2	11/24/2024 11:04 AM
22	0	11/23/2024 6:38 PM
23	2	11/23/2024 5:44 PM
24	0	11/23/2024 2:14 PM
25	0	11/23/2024 11:51 AM
26	1	11/23/2024 11:16 AM
27	1	11/23/2024 11:05 AM
28	2	11/23/2024 7:26 AM
29	1	11/22/2024 5:54 PM
30	2	11/22/2024 5:53 PM

31	0	11/22/2024 5:19 PM
32	2	11/22/2024 4:57 PM
33	2	11/22/2024 4:21 PM
34	1	11/22/2024 2:45 PM
35	0	11/22/2024 2:09 PM
36	2	11/22/2024 1:39 PM
37	2	11/19/2024 9:22 PM
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39	2	11/15/2024 12:59 PM
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41	2	11/15/2024 7:15 AM
42	2	11/15/2024 6:04 AM
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45	2	11/14/2024 11:49 AM
46	1	11/12/2024 10:23 PM
47	2	11/12/2024 6:14 PM
48	0	11/12/2024 5:38 PM
49	2	11/10/2024 1:50 PM
50	2	11/6/2024 7:58 PM
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52	2	11/5/2024 12:40 PM
53	0	11/5/2024 12:11 PM
54	0	11/5/2024 11:53 AM
55	2	11/5/2024 11:24 AM
56	1	11/5/2024 10:27 AM
57	0	11/5/2024 10:04 AM
58	1	11/5/2024 10:02 AM
59	2	11/5/2024 9:54 AM
60	2	11/5/2024 9:37 AM
61	0	11/5/2024 9:20 AM
62	2	11/5/2024 9:15 AM
63	2	11/5/2024 9:14 AM
64	2	11/4/2024 7:24 PM
65	2	11/4/2024 4:19 PM
66	1	11/3/2024 1:37 PM
67	2	11/3/2024 1:22 PM
68	2	11/3/2024 1:04 PM

69	2	11/2/2024 9:36 PM
70	1	11/1/2024 11:41 PM
71	1	11/1/2024 10:16 PM
72	1	11/1/2024 10:05 AM
73	1	11/1/2024 9:46 AM
74	1	11/1/2024 9:21 AM
75	2	10/31/2024 9:41 PM
76	2	10/31/2024 2:54 PM
77	2	10/31/2024 1:59 PM
78	1	10/31/2024 1:28 PM
79	2	10/31/2024 1:13 PM
#	40 TO 49 YEARS	DATE
1	2	12/17/2024 9:22 PM
2	0	12/10/2024 3:07 PM
3	2	12/9/2024 12:52 PM
4	0	12/2/2024 1:06 PM
5	2	12/1/2024 12:05 PM
6	2	12/1/2024 11:12 AM
7	0	12/1/2024 7:23 AM
8	0	11/29/2024 6:36 PM
9	1	11/29/2024 2:30 PM
10	2	11/29/2024 1:19 PM
11	1	11/29/2024 7:20 AM
12	0	11/27/2024 8:11 PM
13	1	11/27/2024 9:12 AM
14	2	11/26/2024 7:05 PM
15	2	11/26/2024 7:04 PM
16	2	11/26/2024 6:32 PM
17	2	11/26/2024 3:11 PM
18	2	11/26/2024 2:35 PM
19	0	11/25/2024 9:18 PM
20	2	11/25/2024 8:21 PM
21	2	11/25/2024 3:03 PM
22	1	11/25/2024 9:20 AM
23	2	11/24/2024 8:58 PM
24	2	11/24/2024 6:51 PM
25	2	11/24/2024 1:25 PM
26	1	11/23/2024 8:44 PM

27	2	11/23/2024 7:28 PM
28	0	11/23/2024 6:38 PM
29	0	11/23/2024 2:14 PM
30	1	11/23/2024 1:52 PM
31	2	11/23/2024 11:51 AM
32	1	11/23/2024 11:43 AM
33	1	11/23/2024 11:05 AM
34	2	11/23/2024 10:26 AM
35	2	11/23/2024 10:00 AM
36	2	11/22/2024 10:31 PM
37	1	11/22/2024 7:20 PM
38	3	11/22/2024 6:30 PM
39	2	11/22/2024 6:27 PM
40	1	11/22/2024 5:54 PM
41	2	11/22/2024 5:37 PM
42	1	11/22/2024 5:21 PM
43	1	11/22/2024 5:19 PM
44	2	11/22/2024 4:45 PM
45	2	11/22/2024 4:22 PM
46	2	11/22/2024 3:53 PM
47	2	11/22/2024 3:23 PM
48	1	11/22/2024 2:45 PM
49	0	11/22/2024 2:09 PM
50	2	11/22/2024 12:30 PM
51	0	11/19/2024 9:22 PM
52	2	11/16/2024 8:29 AM
53	2	11/15/2024 2:32 PM
54	1	11/15/2024 8:17 AM
55	0	11/15/2024 7:15 AM
56	1	11/14/2024 8:53 AM
57	2	11/13/2024 8:01 PM
58	2	11/12/2024 5:38 PM
59	1	11/10/2024 1:36 PM
60	2	11/8/2024 3:32 PM
61	2	11/7/2024 9:08 AM
62	1	11/7/2024 7:09 AM
63	2	11/6/2024 10:19 PM
64	2	11/6/2024 8:30 PM

65	2	11/6/2024 8:06 PM
66	2	11/6/2024 7:06 AM
67	2	11/5/2024 9:24 PM
68	0	11/5/2024 8:32 PM
69	40	11/5/2024 4:50 PM
70	1	11/5/2024 3:55 PM
71	1	11/5/2024 3:48 PM
72	2	11/5/2024 3:25 PM
73	2	11/5/2024 12:58 PM
74	2	11/5/2024 12:55 PM
75	2	11/5/2024 12:11 PM
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77	2	11/5/2024 11:20 AM
78	2	11/5/2024 10:44 AM
79	2	11/5/2024 10:41 AM
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81	2	11/5/2024 10:29 AM
82	2	11/5/2024 10:29 AM
83	1	11/5/2024 10:27 AM
84	2	11/5/2024 10:04 AM
85	1	11/5/2024 10:02 AM
86	2	11/5/2024 9:57 AM
87	46	11/5/2024 9:56 AM
88	2	11/5/2024 9:50 AM
89	42	11/5/2024 9:31 AM
90	2	11/5/2024 9:20 AM
91	1	11/5/2024 9:18 AM
92	2	11/5/2024 9:16 AM
93	2	11/5/2024 9:14 AM
94	2	11/4/2024 10:16 PM
95	2	11/4/2024 5:02 PM
96	2	11/3/2024 9:25 PM
97	2	11/3/2024 7:24 PM
98	2	11/2/2024 12:22 AM
99	1	11/1/2024 11:41 PM
100	1	11/1/2024 10:16 PM
101	1	11/1/2024 10:05 AM
102	2	11/1/2024 9:51 AM

103	1	11/1/2024 9:46 AM
104	1	11/1/2024 9:21 AM
105	0	10/31/2024 2:54 PM
106	1	10/31/2024 1:28 PM
107	2	10/31/2024 1:20 PM
#	50 TO 59 YEARS	DATE
1	1	12/11/2024 11:01 AM
2	0	12/10/2024 3:07 PM
3	1	12/5/2024 10:14 AM
4	0	12/2/2024 1:06 PM
5	2	12/2/2024 6:52 AM
6	2	12/1/2024 5:23 PM
7	1	12/1/2024 4:14 PM
8	0	12/1/2024 7:23 AM
9	2	11/29/2024 6:36 PM
10	1	11/29/2024 7:20 AM
11	56	11/28/2024 2:42 PM
12	0	11/27/2024 8:11 PM
13	2	11/27/2024 11:18 AM
14	2	11/26/2024 8:06 PM
15	2	11/26/2024 5:08 PM
16	2	11/26/2024 1:01 PM
17	2	11/26/2024 7:15 AM
18	2	11/25/2024 9:18 PM
19	1	11/24/2024 12:57 PM
20	1	11/24/2024 11:04 AM
21	1	11/23/2024 8:44 PM
22	0	11/23/2024 6:38 PM
23	1	11/23/2024 5:29 PM
24	1	11/23/2024 4:05 PM
25	1	11/23/2024 2:14 PM
26	1	11/23/2024 1:52 PM
27	2	11/23/2024 12:21 PM
28	0	11/23/2024 11:51 AM
29	1	11/23/2024 11:43 AM
30	0	11/23/2024 11:05 AM
31	2	11/23/2024 10:22 AM
32	1	11/22/2024 8:25 PM

33	2	11/22/2024 7:16 PM
34	1	11/22/2024 5:21 PM
35	1	11/22/2024 5:19 PM
36	1	11/22/2024 4:53 PM
37	2	11/22/2024 3:39 PM
38	0	11/22/2024 2:09 PM
39	1	11/22/2024 1:39 PM
40	2	11/21/2024 12:27 PM
41	0	11/19/2024 9:22 PM
42	1	11/18/2024 10:24 AM
43	2	11/17/2024 11:02 AM
44	2	11/15/2024 4:05 PM
45	2	11/15/2024 11:34 AM
46	1	11/15/2024 9:12 AM
47	0	11/15/2024 7:15 AM
48	2	11/14/2024 11:34 PM
49	1	11/14/2024 8:11 PM
50	1	11/12/2024 6:14 PM
51	0	11/12/2024 5:38 PM
52	1	11/10/2024 1:36 PM
53	1	11/7/2024 7:09 AM
54	2	11/6/2024 9:50 AM
55	0	11/5/2024 8:32 PM
56	1	11/5/2024 3:55 PM
57	0	11/5/2024 12:11 PM
58	0	11/5/2024 11:53 AM
59	0	11/5/2024 10:04 AM
60	2	11/5/2024 9:52 AM
61	2	11/5/2024 9:22 AM
62	0	11/5/2024 9:20 AM
63	1	11/5/2024 9:18 AM
64	2	11/3/2024 2:51 PM
65	0	10/31/2024 2:54 PM
66	2	10/31/2024 2:39 PM
67	2	10/31/2024 2:37 PM
68	0	10/31/2024 1:28 PM
#	AGE 60 OR OLDER	DATE
1	72	12/18/2024 2:56 PM

2	2	12/16/2024 7:31 AM
3	2	12/11/2024 11:47 AM
4	2	12/10/2024 3:07 PM
5	1	12/9/2024 11:05 PM
6	2	12/4/2024 12:43 PM
7	2	12/2/2024 8:39 PM
8	0	12/2/2024 1:06 PM
9	2	12/1/2024 4:14 PM
10	2	12/1/2024 9:07 AM
11	2	12/1/2024 7:23 AM
12	1	11/29/2024 10:38 PM
13	0	11/29/2024 6:36 PM
14	68	11/28/2024 11:34 AM
15	2	11/28/2024 9:51 AM
16	2	11/27/2024 8:11 PM
17	66	11/27/2024 8:05 PM
18	2	11/27/2024 11:18 AM
19	2	11/27/2024 11:09 AM
20	0	11/25/2024 9:18 PM
21	2	11/25/2024 3:06 PM
22	2	11/25/2024 12:53 PM
23	1	11/24/2024 9:12 PM
24	1	11/24/2024 12:57 PM
25	1	11/24/2024 9:20 AM
26	2	11/24/2024 6:29 AM
27	2	11/24/2024 6:27 AM
28	2	11/24/2024 4:33 AM
29	1	11/23/2024 7:28 PM
30	1	11/23/2024 7:07 PM
31	2	11/23/2024 6:38 PM
32	1	11/23/2024 5:29 PM
33	1	11/23/2024 4:46 PM
34	1	11/23/2024 4:05 PM
35	0	11/23/2024 2:14 PM
36	2	11/23/2024 1:32 PM
37	2	11/23/2024 1:26 PM
38	0	11/23/2024 11:51 AM
39	0	11/23/2024 11:05 AM

40	2	11/23/2024 10:10 AM
41	65	11/23/2024 9:25 AM
42	2	11/23/2024 7:26 AM
43	2	11/23/2024 7:14 AM
44	2	11/23/2024 5:03 AM
45	2	11/22/2024 8:25 PM
46	2	11/22/2024 7:20 PM
47	2	11/22/2024 6:41 PM
48	76	11/22/2024 6:25 PM
49	0	11/22/2024 5:19 PM
50	2	11/22/2024 5:14 PM
51	2	11/22/2024 5:08 PM
52	1	11/22/2024 4:53 PM
53	2	11/22/2024 3:39 PM
54	2	11/22/2024 2:09 PM
55	2	11/22/2024 1:39 PM
56	0	11/19/2024 9:22 PM
57	2	11/18/2024 10:24 AM
58	2	11/18/2024 8:21 AM
59	1	11/16/2024 8:29 AM
60	2	11/15/2024 5:30 PM
61	0	11/15/2024 7:15 AM
62	2	11/14/2024 11:10 PM
63	2	11/14/2024 8:11 PM
64	2	11/12/2024 10:23 PM
65	2	11/12/2024 6:14 PM
66	0	11/12/2024 5:38 PM
67	1	11/11/2024 3:44 PM
68	0	11/5/2024 8:32 PM
69	0	11/5/2024 12:11 PM
70	0	11/5/2024 11:53 AM
71	2	11/5/2024 10:36 AM
72	1	11/5/2024 10:04 AM
73	1	11/5/2024 9:37 AM
74	0	11/5/2024 9:20 AM
75	1	11/4/2024 8:42 PM
76	1	11/4/2024 1:45 PM
77	2	11/1/2024 1:38 PM

78	2	10/31/2024 8:58 PM
79	0	10/31/2024 2:54 PM
80	0	10/31/2024 1:28 PM
81	65	10/31/2024 1:08 PM

Q26 Please share any additional thoughts/comments:

Answered: 78 Skipped: 153

#	RESPONSES	DATE
1	Please do not waste our hard earned money on amenities that only benefit a few people.	12/16/2024 7:31 AM
2	Preserving nature and historical areas brings joy to my soul as someone who grew up in Archer Lodge moved away and returned later to build a family. Places for families to gather and spend time together is ideal for our community	12/12/2024 2:28 PM
3	I thought that it was not going to expand to keep the taxes and cost down at the Budget Meeting?	12/11/2024 11:01 AM
4	I see activities listed on Facebook, but there is no option for additional information. When I stop by the Community Center it is closed.	12/10/2024 3:07 PM
5	If you have that much money pave Raintree Dr off if Buffalo Rd then I can see where my tax \$ are going sick if see money wasted we need a police station post office you to be a town then be a town	12/9/2024 11:05 PM
6	This so called town and additional tax burden was unknowingly to me when my home was purchased. Further explained as a plan to prevent annexation and additional taxes. (In 2011 implementation to go through state legislation)Well this so called town has been anything but truth. Oversized HOA. What happens fifteen years from now when my house is for sale and another of the same type is for sale a few miles out of the so called town limits. Americans are sick of paying taxes. Smaller government is what we need. Let's work on decreasing the tax burden. You are spending other people's money and potentially creating a huge debt to be paid by only a few people. My opinion.	12/5/2024 10:14 AM
7	Need to make sure to provide services for all ages	12/4/2024 12:43 PM
8	NA	12/1/2024 5:23 PM
9	Would love to see adult softball leagues.	12/1/2024 9:07 AM
10	None	12/1/2024 7:23 AM
11	Fix the exit from the Community Center parking lot onto Archer Lodge Road. The one along the tree line furthest from the intersection. If this is supposed to be an exit then make people stop parking there and put some fill in so my car doesn't scrape. If it's not supposed to be an exit then it's not clear. Drainage needs addressed over by the concession stand for the baseball/softball field. Lights need to be on in the evenings if practices are in the evenings. Good luck with the sink holes by the water tower!	11/30/2024 7:55 PM
12	Would really like some lights and maybe fencing at castleberry playground. Get stuck watching baseball games late and can't see the other kids at all on the playground. Great park so far though!	11/30/2024 2:58 PM
13	None	11/29/2024 6:36 PM
14	I enjoy Archer's Lodge Community	11/28/2024 11:34 AM
15	None	11/27/2024 8:05 PM
16	We love this town! My son gets to grow up here. So cool.	11/27/2024 7:25 PM
17	Na	11/27/2024 11:09 AM
18	We would love to see more rec available here in archer lodge because going into Clayton is so inconvenient. We would love a pool and splash pad, we would definitely join a pool with a gym.	11/27/2024 1:58 AM
19	An outdoor basketball court would be a great addition to the Archer Lodge park	11/26/2024 3:35 PM
20	None	11/26/2024 3:11 PM

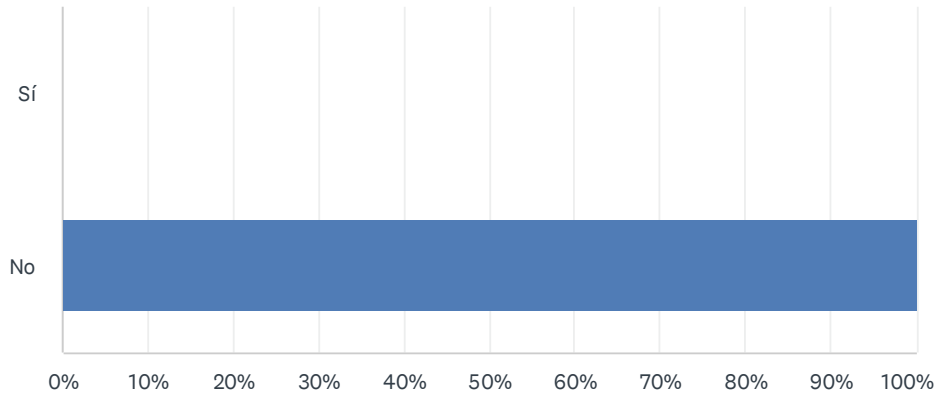
21	As Archer Lodge develops need to work with developers on ways to incorporate active outdoor activities within community.	11/26/2024 1:01 PM
22	I hope you plan to build a skatepark at the park on castleberry. It would fit nicely.	11/25/2024 9:57 PM
23	Please build a skatepark, it would be a great addition to the anchor lodge park on castleberry. Teampain is a great builder, they built the one in apex	11/25/2024 9:48 PM
24	Na	11/24/2024 1:25 PM
25	Thanks for asking and sending out survey cards in mail.	11/24/2024 12:57 PM
26	Archer Lodge is a wonderful community. We love going to the park at the community center and the Monday night dinners throughout the year. Meeting new people and fellowship. Wish we had a community swimming pool for the hot summer months. When I retire in a few years, I plan to be fully involved in a community.	11/24/2024 11:04 AM
27	Senior activities are needed, Musical participation activities such as guitar and ukulele lessons, musical jam opportunities (Bluegrass, Acoustic, Jazz, Folk) would be appreciated.	11/23/2024 7:07 PM
28	I am active but not dependent on a town to provide entertainment and social interaction. It is nice to want to provide parks and recreational activities and facilities, but I don't want to have to pay for it thru increased taxes. The trouble with all this is that a few people get excited and ambitious to implement projects that "everybody" would enjoy or appreciate. If those who use and benefit from the facilities and activities paid for those things, great, go for it. But when the many who cannot use the facilities or participate in the activities get taxed to pay the expenses and cannot opt out, well, that smacks of communism/socialism. I don't want my taxes to increase because the parks and rec dept spends my tax dollars on entertaining a few people. I'm not rich, have no income and paying for necessities is a struggle as it is. To be forced to pay for the pleasures of others would be the last straw. Believe me, taxes are taken by force, through threat of imprisonment. Don't want, it can't afford it.	11/23/2024 6:38 PM
29	A community indoor gym and outdoor gym would be great.	11/23/2024 5:44 PM
30	No	11/23/2024 12:21 PM
31	As a older couple we feel we get very little for our tax dollars. Please no more tax increases...in fact look to lower them	11/23/2024 10:10 AM
32	N/A	11/22/2024 10:31 PM
33	Would be nice to have a couple more outdoor shelters in the park for rentals. Because there already is a bathroom facility these shelters would need nothing other than a roof, floor, and picnic tables	11/22/2024 7:20 PM
34	Need more ball fields for children	11/22/2024 7:20 PM
35	Taxes too high and no amenities with existing budget. Not in favor of the town increasing taxes instead of trying to manage existing funds. Very disappointed in high salaries for town staff. Money can b better spent.	11/22/2024 6:30 PM
36	Archer Lodge, I love you. I don't know how other people feel but it seems like a swing and a miss to me that the new park is so focused on team sports areas. To maintain regulation fields there is so much upkeep required. My son is disinterested in all of those sports, esports is where he focuses. Past that it's all just simple things. We like walking, nature, seeing history, science... I am not going to say that ball fields are a waste. It's just with the size of the town and the demographics of the residents within it, I don't think it justifies the development being the way it is. This will lead to higher taxes for us to fund facilities that are mostly used for people outside of town limits. Not to mention I feel like all those facilities are "off limits" to me and my family so I don't risk damaging the turf.	11/22/2024 5:54 PM
37	Please build a basketball court!!!	11/22/2024 5:53 PM
38	Na	11/22/2024 5:37 PM
39	I would love a dog park!	11/22/2024 5:21 PM
40	We need tennis courts as the closest public courts are Knightdale Smithfield	11/22/2024 5:19 PM
41	No tax increases	11/22/2024 5:14 PM

42	We are retired living on fixed incomes. Both of us are active, exercise daily except Sundays, and are in great health. We are interested in and participate in many social, physical, political, cultural and church activities. However, we can find sources for all those things without having the town raise taxes for development of those activities.	11/22/2024 2:09 PM
43	Need a disc golf course in Archer lodge so we do not have to travel to different towns	11/22/2024 1:39 PM
44	It's a shame that I have to go to different towns to play my sport, disc golf, when we have a perfectly new recreational area in our town that I'm sure town taxes paid for	11/18/2024 10:24 AM
45	The Mayor, Town Council, Planning board and employees all need to get on the same page. The town employees really need someone to give them an agenda of things to do daily, because they are behind on meeting minutes that we all can see, what else is lacking . The parks do not even look that busy anyway all through the summer there was not that much happening to me because I go by them two to three time daily. Obviously to me the town needs to maintain what they have.	11/18/2024 8:21 AM
46	None	11/15/2024 12:59 PM
47	Park park park is that all y'all have on your minds and trying to figure out how to raise our taxes. The town is so out of touch in my opinion.	11/15/2024 11:34 AM
48	Even though I didn't mark the younger kid activities they are very important. I am just out of that stage	11/15/2024 9:12 AM
49	N/a	11/15/2024 6:04 AM
50	N/A	11/14/2024 11:49 PM
51	We have enough parks already for mostly outsiders to use. It's all the town thinks about park and trying to raise our taxes.	11/14/2024 8:11 PM
52	How about focus on revamping the town website for better navigation. I am not interested in paying more taxes to support programs that directly result in taking away from the small town environment we love. Also, if the parks are advertised to open at certain times, the gate should be unlocked and open promptly at those times. Meeting minutes are required to be published but are not up to date. The town Facebook page is updated multiple times throughout the day but the meeting minutes are not published within a reasonable time period or at all. The town staff need to get their priorities in order.	11/14/2024 8:11 PM
53	Open the fields for all to use 7 days a week! Quit locking the fields down!	11/14/2024 8:53 AM
54	Disc Golf in this area would be great. It's a shame we have to go to Knightdale or Zebulon to enjoy these activities	11/12/2024 6:14 PM
55	Please work out a deal with Mr. David Pace to acquire his land for use as a nature preserve & not let a developer turn it into another Riverwood.	11/12/2024 5:38 PM
56	Thank you!	11/10/2024 1:50 PM
57	Would love to see more recreational activities/teams for kids and teens. Also would love to see the walking trails/sidewalks come to fruition to reduce traffic (maybe)	11/8/2024 3:32 PM
58	We would love to see a large sports complex that supports a variety of sports- indoor court sports, outdoor field sports and tennis.	11/7/2024 7:09 AM
59	Please update the baseball fields at archer lodge community center. Create both baseball and softball fields. Allow the public to use the the baseball fields and stop locking them up. This allows, the kids, positive activities and keep them out of trouble Stop building amphitheaters nobody uses them.	11/6/2024 10:19 PM
60	Not enough soccer fields to handle growth of the sport. No sand volleyball courts. No indoor volleyball courts.	11/6/2024 8:30 PM
61	Fees to play ball are the highest in the county and need to be more affordable. Younger kids do not need to play the late games. If the new park is going to be the "main" park where games are played, the field at ALCC should not be locked so that when games aren't being played there, others may come to practice improving their skills after school. "Public" or "Community" parks should not be locked. The town put all its eggs in the JCLL basket and the citizens should not be expected to cover its shortfalls because of poor management and planning.	11/5/2024 9:24 PM

62	None	11/5/2024 3:25 PM
63	Na	11/5/2024 11:20 AM
64	Severely disappointed with current P&R director and person who hired him. Nice guy but does very little to promote and doesn't understand needs of the community.	11/5/2024 10:41 AM
65	Na	11/5/2024 10:29 AM
66	Please stop building housing developments. The roads can't handle more traffic, especially the intersection of Buffalo and Covered Bridge.	11/5/2024 10:27 AM
67	We live right next to Archer Lodge town limit and visit the parks often with our children	11/5/2024 9:37 AM
68	Please illuminate playgrounds when ball games are being played. You have a dozen kids or more playing in the dark at Castleberry rd. Park whenever there is a night game. Parents are not watching the playground because the ball games are being played. This is dangerous for many reasons. Lighting would help for a lot of reasons and is not an unreasonable request or expense.	11/5/2024 9:20 AM
69	Need more disc golf	11/5/2024 9:16 AM
70	na	11/3/2024 1:04 PM
71	The bigger kid playground at the castleberry park seems very dangerous. My child is younger, however I would be concerned to let him play on the bigger playground equipment if he was in that age group.	11/2/2024 9:36 PM
72	Offer summer day camps, expand trails, improve facilities	11/1/2024 11:41 PM
73	The park on Castleberry is not being locked and someone has been sleeping in their car. There was an email sent last week and twice the man has been seen sleeping there this week, the park has NOT been locked once in months. If we want to do more we have to manage what we currently have and that is NOT happening. DO BETTER!	11/1/2024 10:05 AM
74	Thank you for all you are doing!	11/1/2024 9:51 AM
75	Stop building houses and preserve the nature that makes Archer Lodge a desirable place to be.	11/1/2024 9:46 AM
76	We need more walking/biking trails for kids and parents to safely walk to our town park. Maybe even a crosswalk with flashing lights Across Castleberry. Also a trail connected to the sidewalk off S Murphreys rd would be wonderful!	11/1/2024 9:21 AM
77	No taxes for ballparks that are used only 3-5 months per year	10/31/2024 8:58 PM
78	There are never available restrooms at park facilities unless a major event is going on. It is a shame to have nice restrooms and make people use portapotties with young children.	10/31/2024 2:37 PM

Q1 ¿Ha participado usted o su familia en algún programa de Parques y Recreación de la Ciudad de Archer Lodge en los últimos 12 meses?

Answered: 1 Skipped: 0

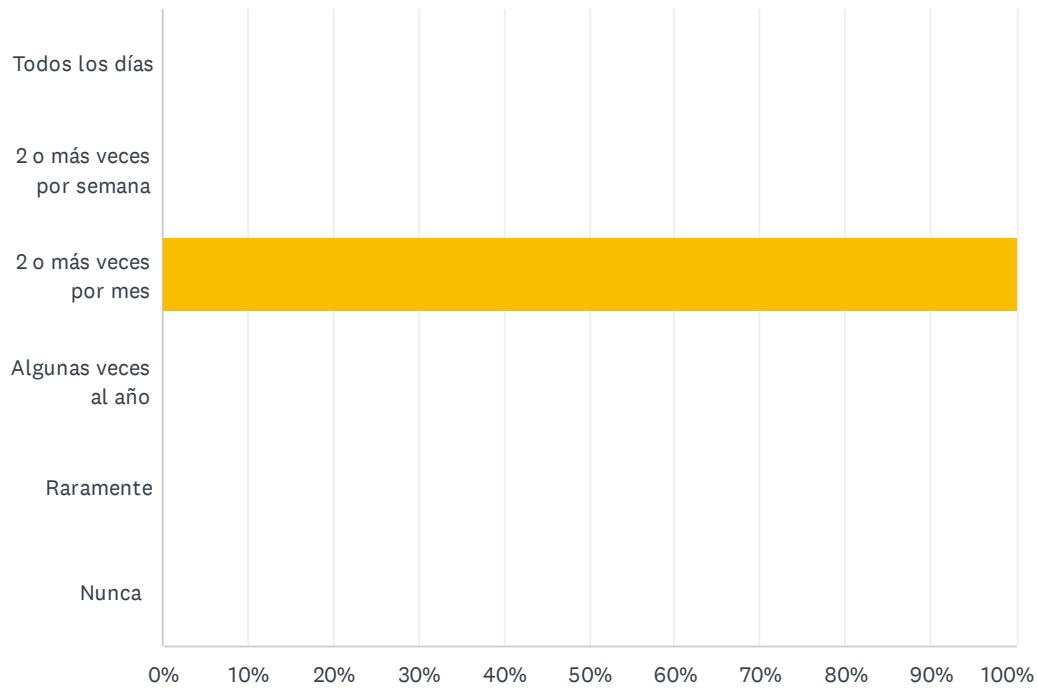


ANSWER CHOICES	RESPONSES
Sí	0.00% 0
No	100.00% 1
TOTAL	1

#	EN CASO AFIRMATIVO, POR FAVOR INDIQUE EN CUALES:	DATE
	There are no responses.	

Q2 ¿Con qué frecuencia usted y su familia visitan un parque o sendero?

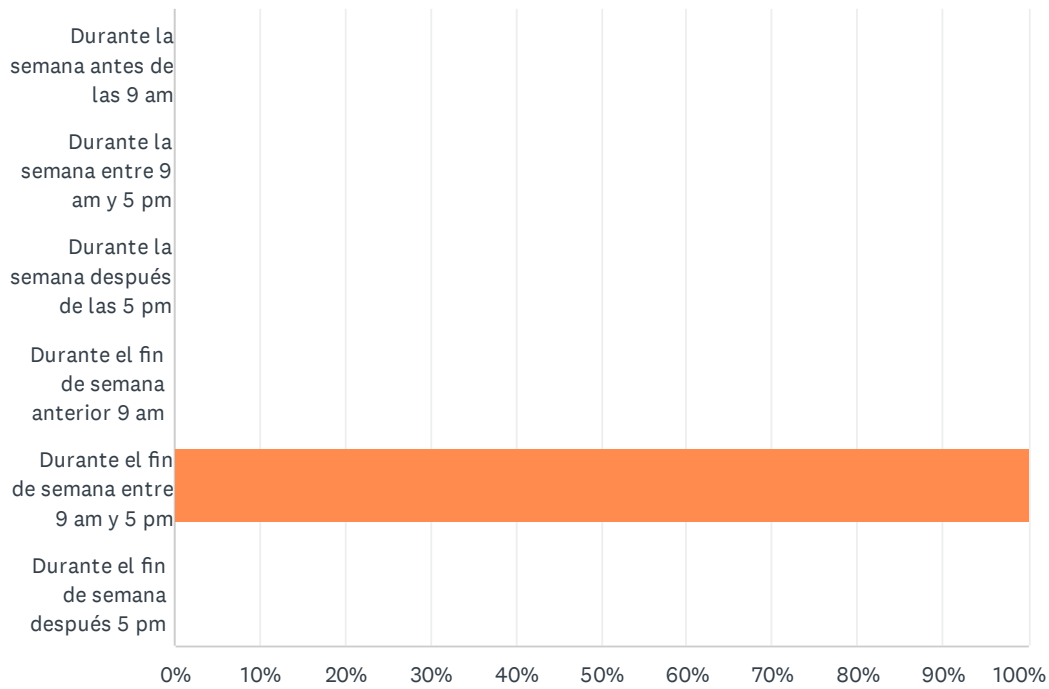
Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES
Todos los días	0.00% 0
2 o más veces por semana	0.00% 0
2 o más veces por mes	100.00% 1
Algunas veces al año	0.00% 0
Raramente	0.00% 0
Nunca	0.00% 0
TOTAL	1

Q3 ¿A qué horas del día es más probable que use un parque o sendero?

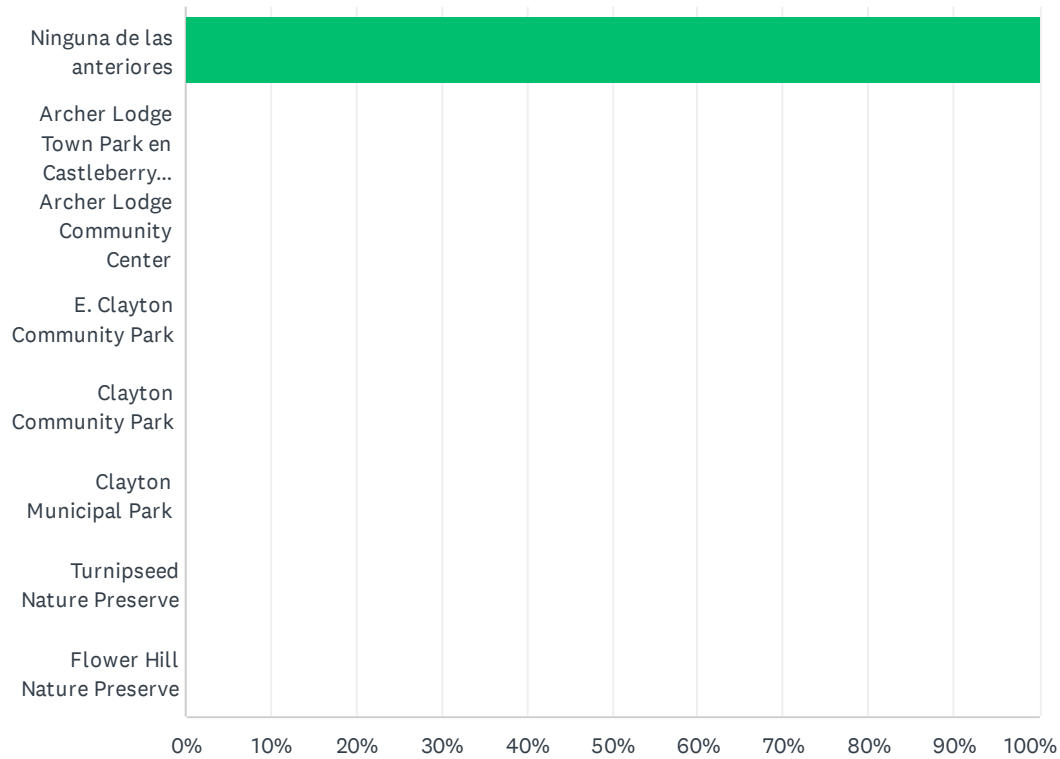
Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES	
Durante la semana antes de las 9 am	0.00%	0
Durante la semana entre 9 am y 5 pm	0.00%	0
Durante la semana después de las 5 pm	0.00%	0
Durante el fin de semana anterior 9 am	0.00%	0
Durante el fin de semana entre 9 am y 5 pm	100.00%	1
Durante el fin de semana después 5 pm	0.00%	0
TOTAL		1

Q4 Indique qué parques y senderos e instalaciones comunitarias ha visitado durante el año pasado. Seleccione todas las que correspondan.

Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES	
Ninguna de las anteriores	100.00%	1
Archer Lodge Town Park en Castleberry Road	0.00%	0
Archer Lodge Community Center	0.00%	0
E. Clayton Community Park	0.00%	0
Clayton Community Park	0.00%	0
Clayton Municipal Park	0.00%	0
Turnipseed Nature Preserve	0.00%	0
Flower Hill Nature Preserve	0.00%	0
Total Respondents: 1		

Q5 ¿Qué otros parques / instalaciones municipales, escuelas, clubes de salud, lugares de culto u otras organizaciones utiliza para la recreación?

Answered: 1 Skipped: 0

#	RESPONSES	DATE
1	Milbron park	11/24/2024 8:14 AM

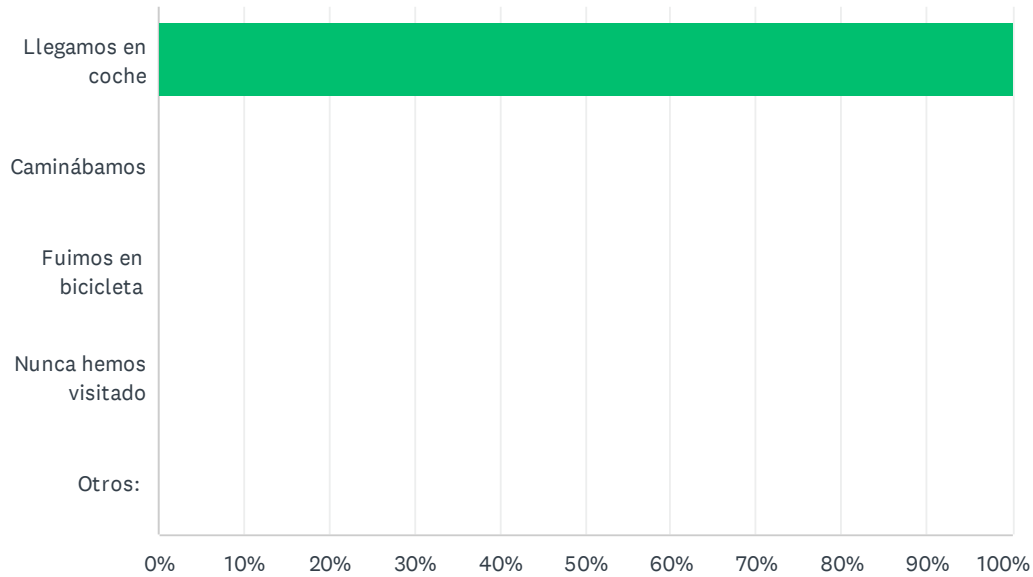
Q6 ¿Qué parque o instalación recreativa está más cerca de su hogar?

Answered: 1 Skipped: 0

#	RESPONSES	DATE
1	No se	11/24/2024 8:14 AM

Q7 En la visita más reciente de alguien de su hogar a cualquier parque o instalación recreativa, ¿cómo llegó allí?

Answered: 1 Skipped: 0

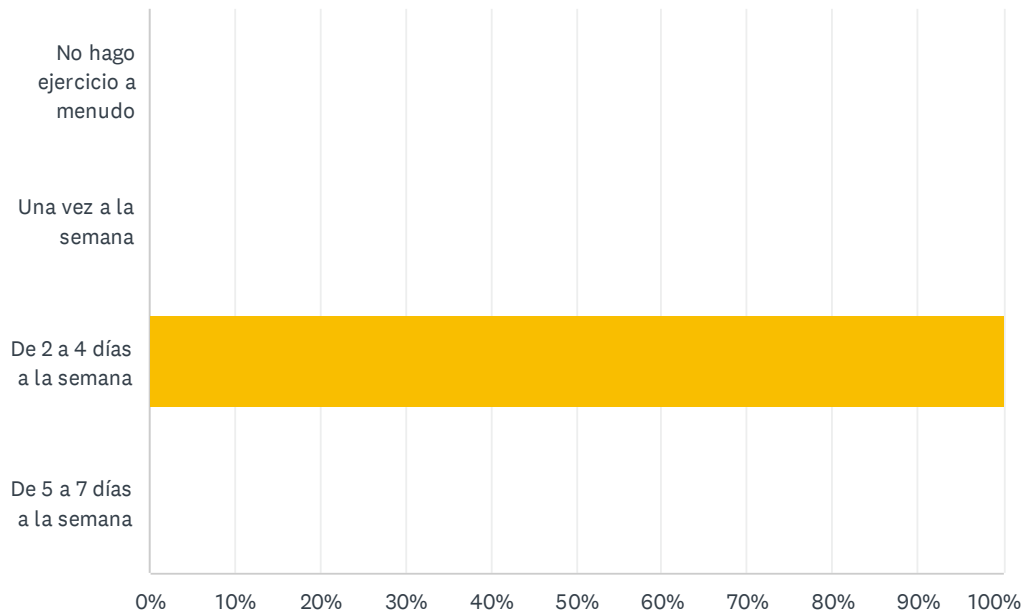


ANSWER CHOICES	RESPONSES
Llegamos en coche	100.00% 1
Caminábamos	0.00% 0
Fuimos en bicicleta	0.00% 0
Nunca hemos visitado	0.00% 0
Otros:	0.00% 0
TOTAL	1

#	OTROS:	DATE
	There are no responses.	

Q8 En una semana normal, ¿cuántos días haces ejercicio?

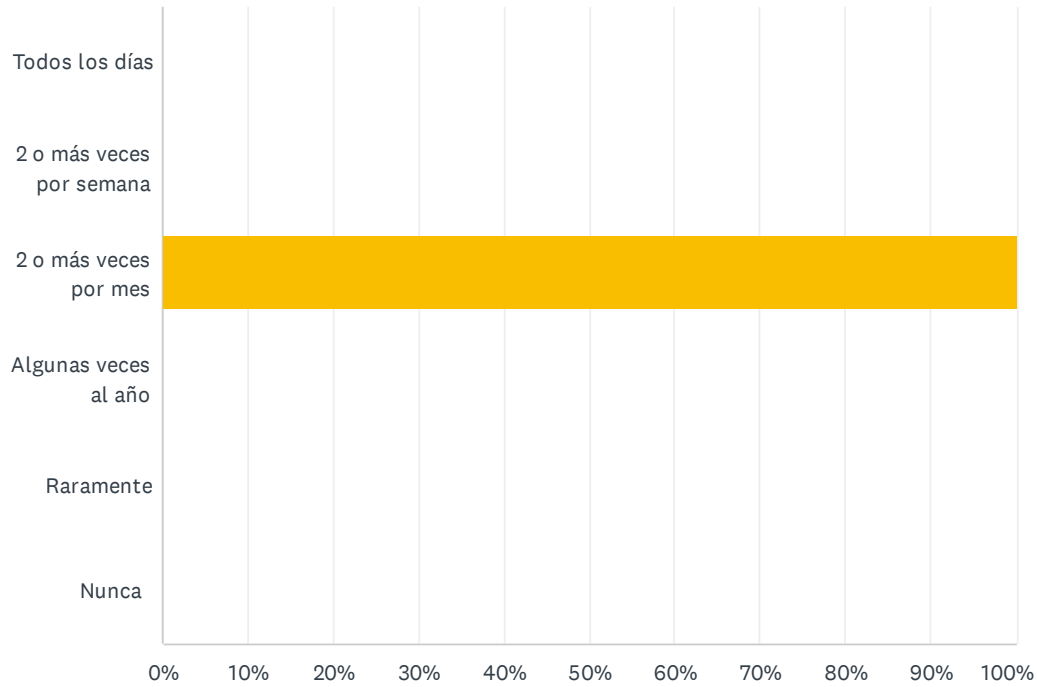
Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES	
No hago ejercicio a menudo	0.00%	0
Una vez a la semana	0.00%	0
De 2 a 4 días a la semana	100.00%	1
De 5 a 7 días a la semana	0.00%	0
TOTAL		1

Q9 ¿Con qué frecuencia visitas el parque municipal Archer Lodge en Castleberry Road?

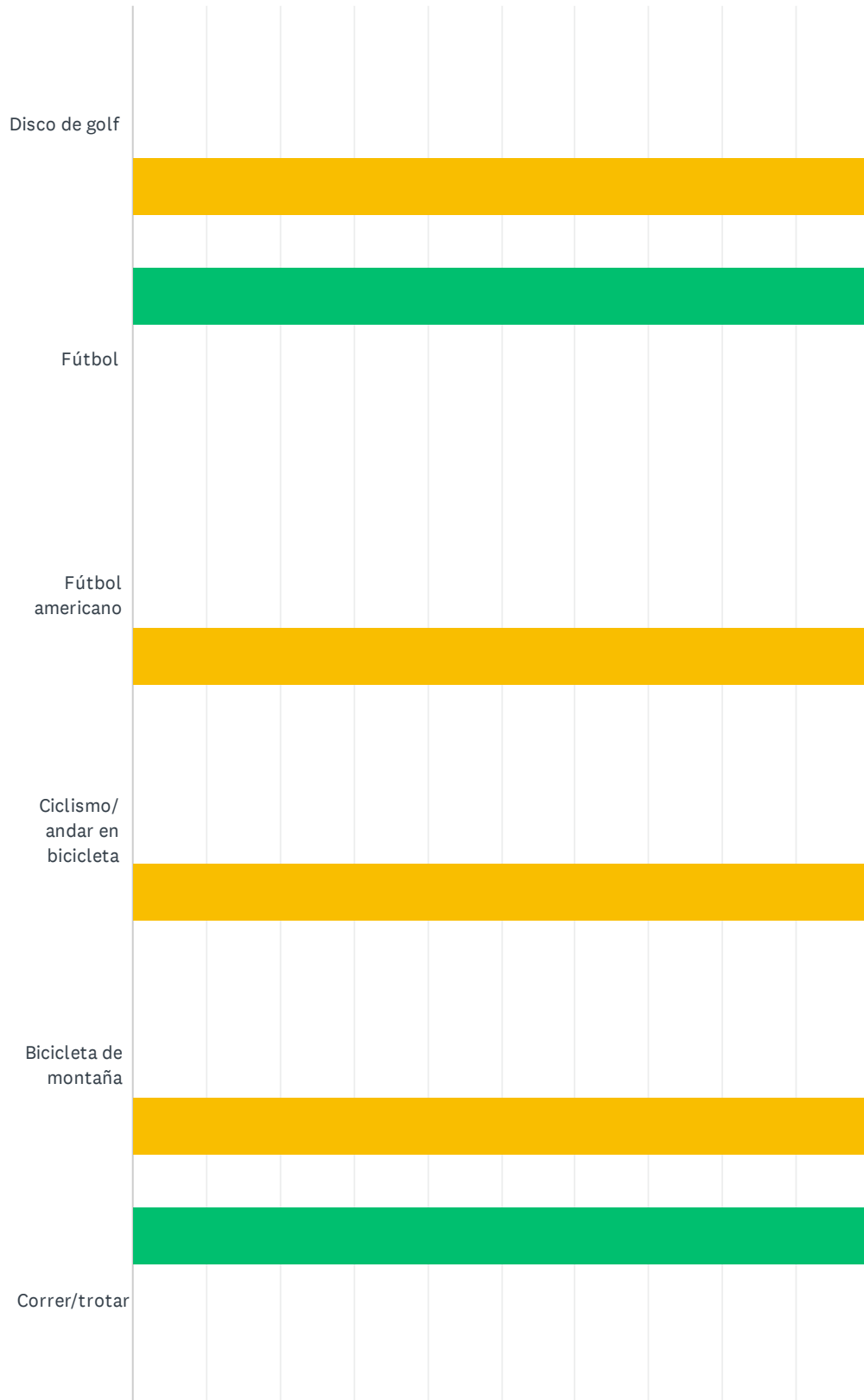
Answered: 1 Skipped: 0

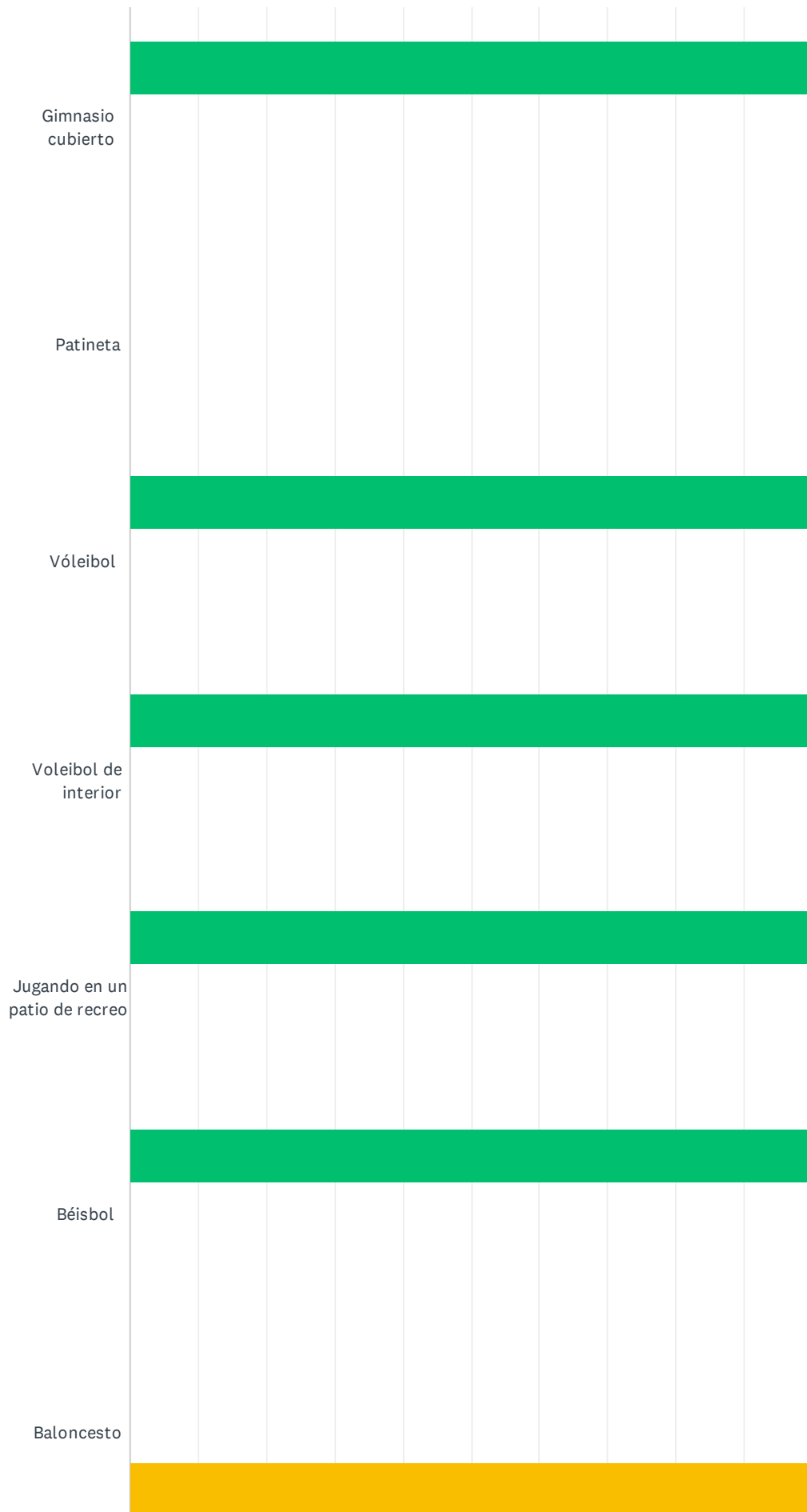


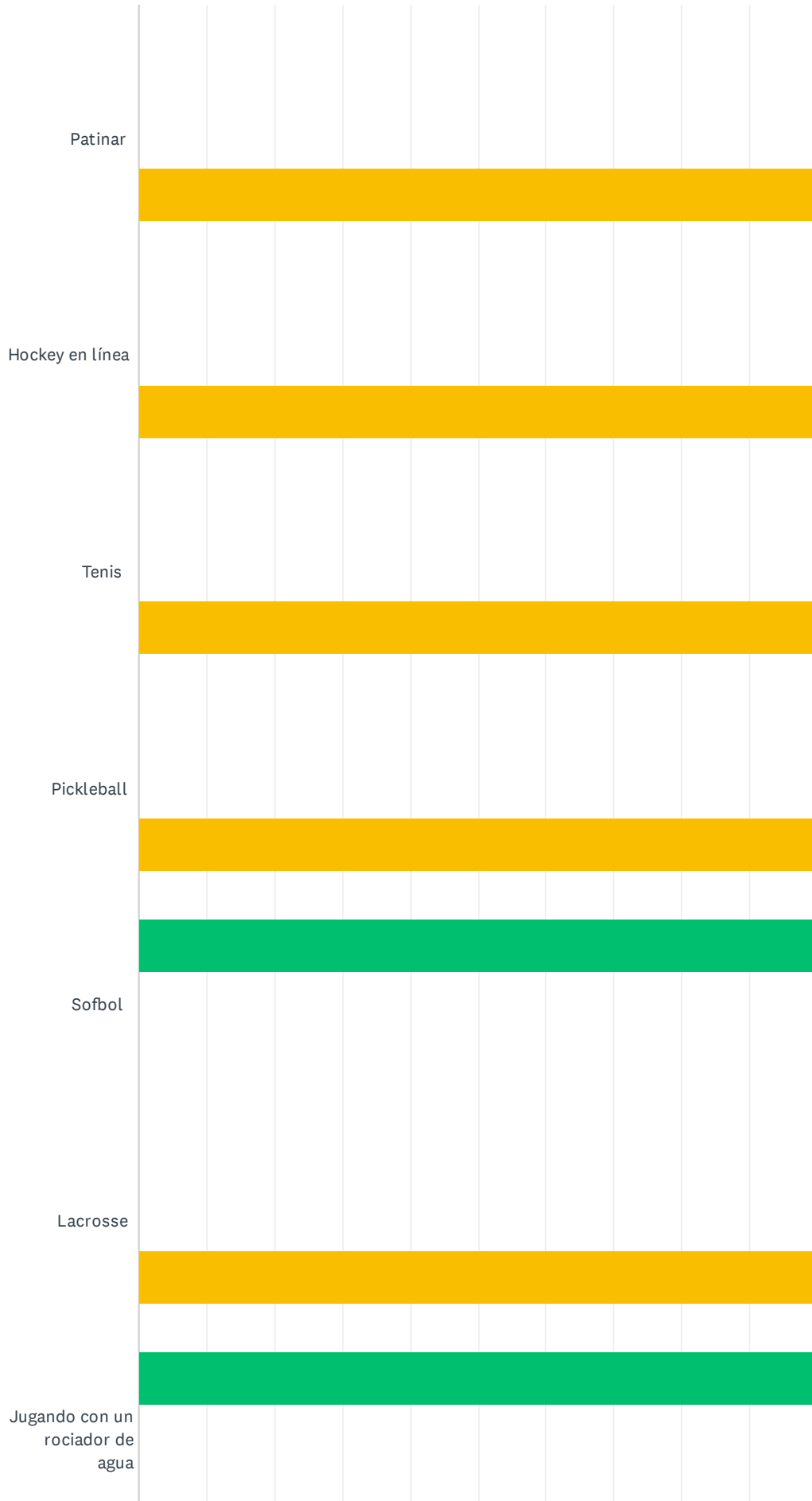
ANSWER CHOICES	RESPONSES	
Todos los días	0.00%	0
2 o más veces por semana	0.00%	0
2 o más veces por mes	100.00%	1
Algunas veces al año	0.00%	0
Raramente	0.00%	0
Nunca	0.00%	0
TOTAL		1

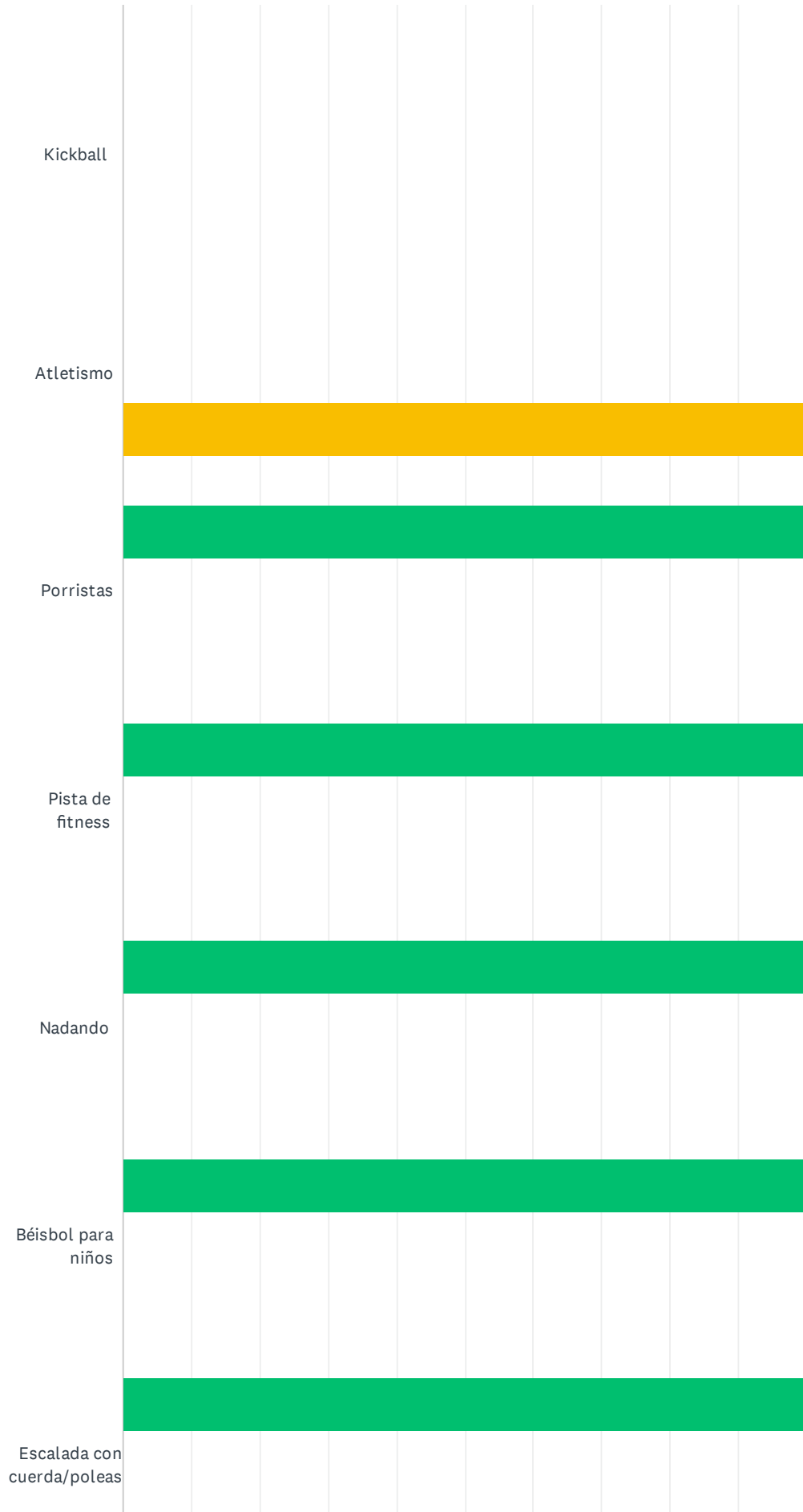
Q10 Califique su interés en las actividades deportivas que se enumeran a continuación:

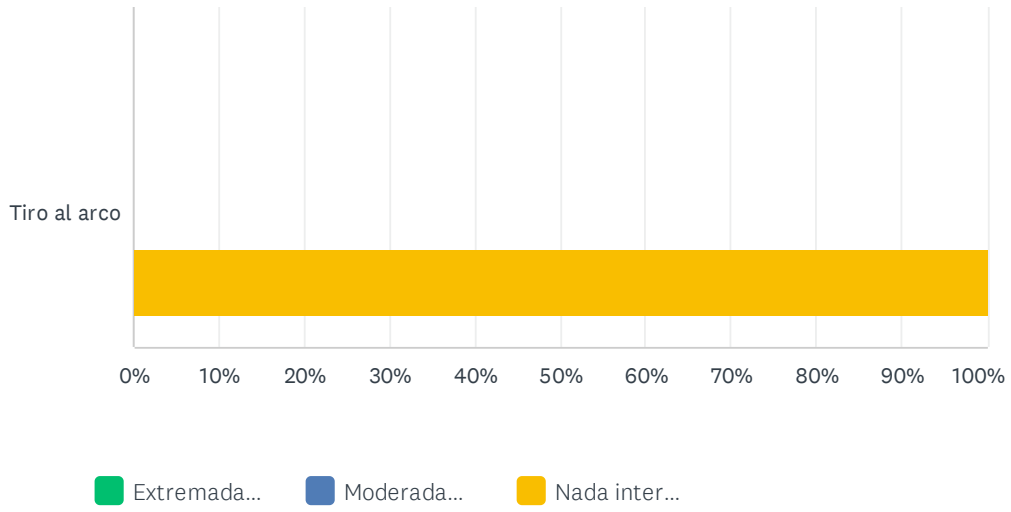
Answered: 1 Skipped: 0









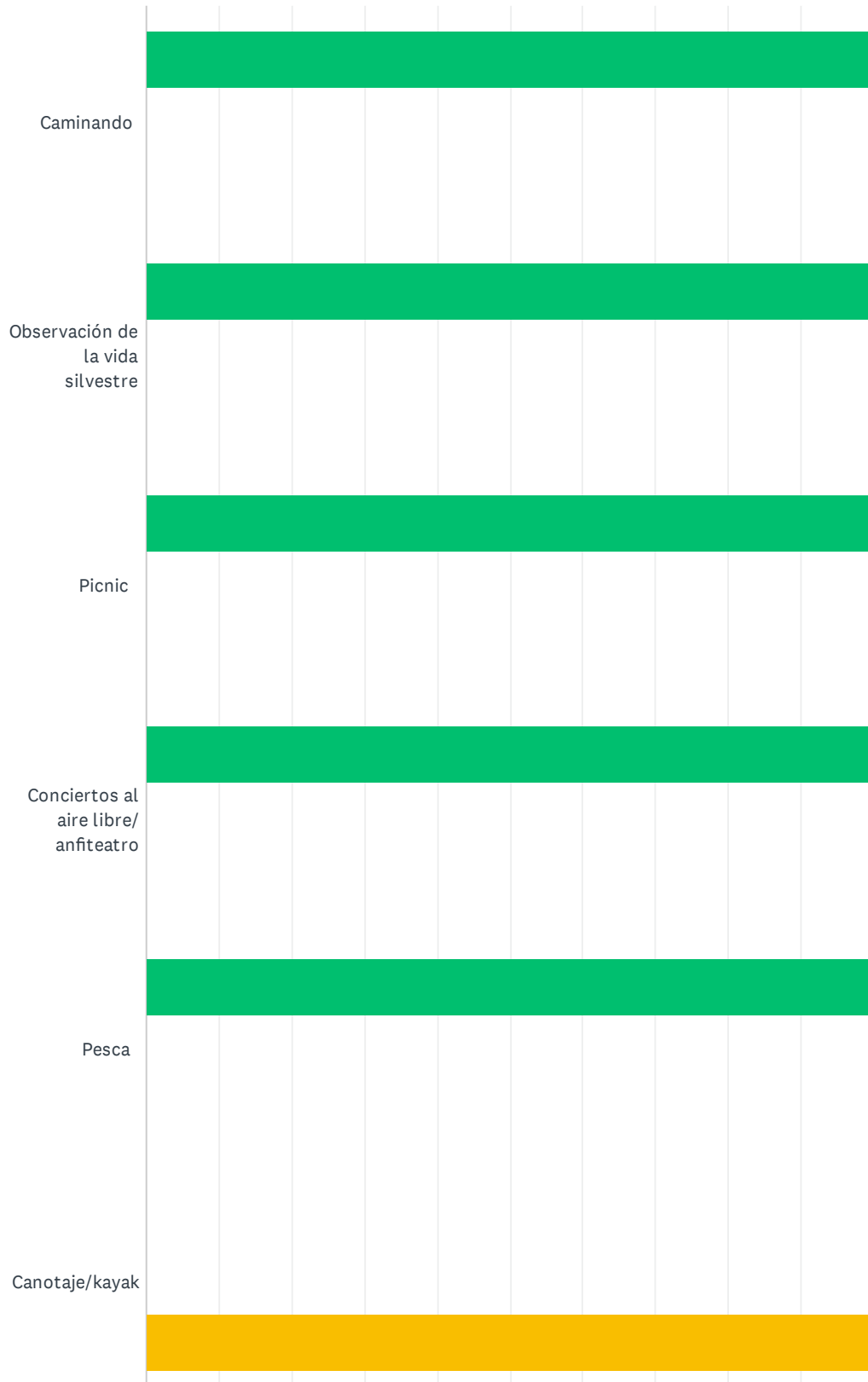


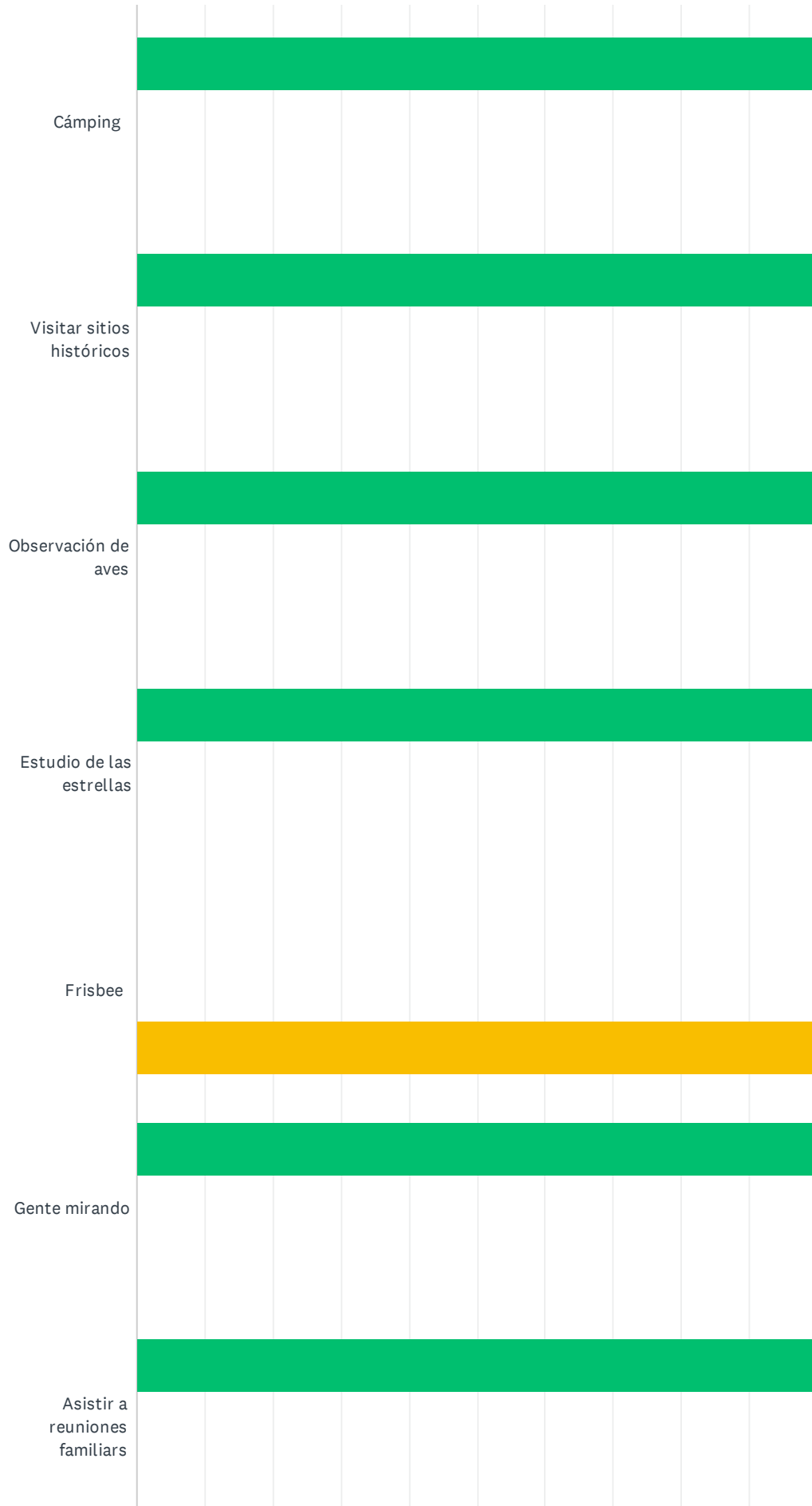
	EXTREMADAMENTE INTERESADO	MODERADAMENTE INTERESADO	NADA INTERESADO	TOTAL	WEIGHTED AVERAGE
Disco de golf	0.00% 0	0.00% 0	100.00% 1	1	1.00
Fútbol	100.00% 1	0.00% 0	0.00% 0	1	3.00
Fútbol americano	0.00% 0	0.00% 0	100.00% 1	1	1.00
Ciclismo/ andar en bicicleta	0.00% 0	0.00% 0	100.00% 1	1	1.00
Bicicleta de montaña	0.00% 0	0.00% 0	100.00% 1	1	1.00
Correr/trotar	100.00% 1	0.00% 0	0.00% 0	1	3.00
Gimnasio cubierto	100.00% 1	0.00% 0	0.00% 0	1	3.00
Patineta	0.00% 0	0.00% 0	0.00% 0	0	0.00
Vóleibol	100.00% 1	0.00% 0	0.00% 0	1	3.00
Voleibol de interior	100.00% 1	0.00% 0	0.00% 0	1	3.00
Jugando en un patio de recreo	100.00% 1	0.00% 0	0.00% 0	1	3.00
Béisbol	100.00% 1	0.00% 0	0.00% 0	1	3.00
Baloncesto	0.00% 0	0.00% 0	100.00% 1	1	1.00
Patinar	0.00% 0	0.00% 0	100.00% 1	1	1.00
Hockey en línea	0.00% 0	0.00% 0	100.00% 1	1	1.00
Tenis	0.00% 0	0.00% 0	100.00% 1	1	1.00
Pickleball	0.00% 0	0.00% 0	100.00% 1	1	1.00
Sofbol	100.00% 1	0.00% 0	0.00% 0	1	3.00
Lacrosse	0.00% 0	0.00% 0	100.00% 1	1	1.00
Jugando con un rociador de agua	100.00% 1	0.00% 0	0.00% 0	1	3.00
Kickball	0.00% 0	0.00% 0	0.00% 0	0	0.00
Atletismo	0.00% 0	0.00% 0	100.00% 1	1	1.00
Porristas	100.00% 1	0.00% 0	0.00% 0	1	3.00

Pista de fitness	100.00% 1	0.00% 0	0.00% 0	1	3.00
Nadando	100.00% 1	0.00% 0	0.00% 0	1	3.00
Béisbol para niños	100.00% 1	0.00% 0	0.00% 0	1	3.00
Escalada con cuerda/poleas	100.00% 1	0.00% 0	0.00% 0	1	3.00
Tiro al arco	0.00% 0	0.00% 0	100.00% 1	1	1.00

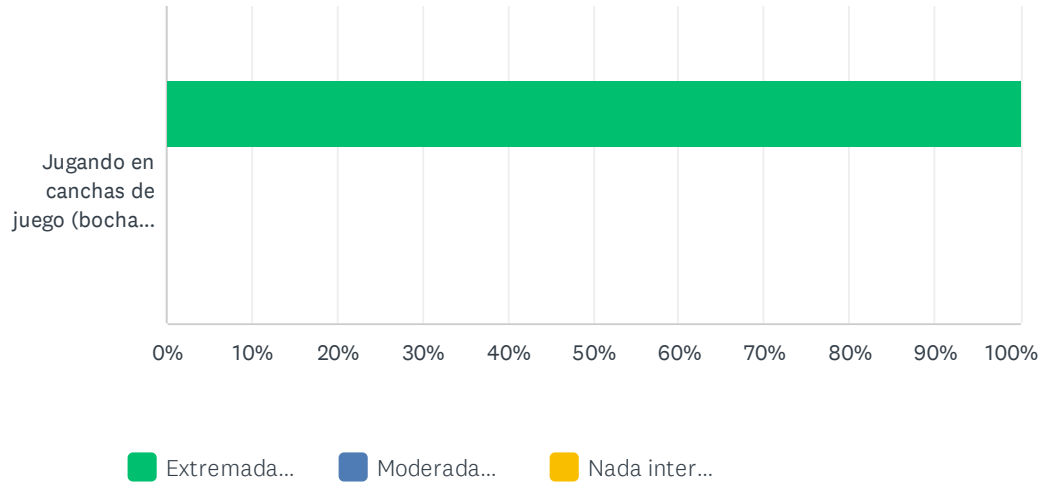
Q11 Califique su interés en las actividades relajantes enumeradas a continuación:

Answered: 1 Skipped: 0





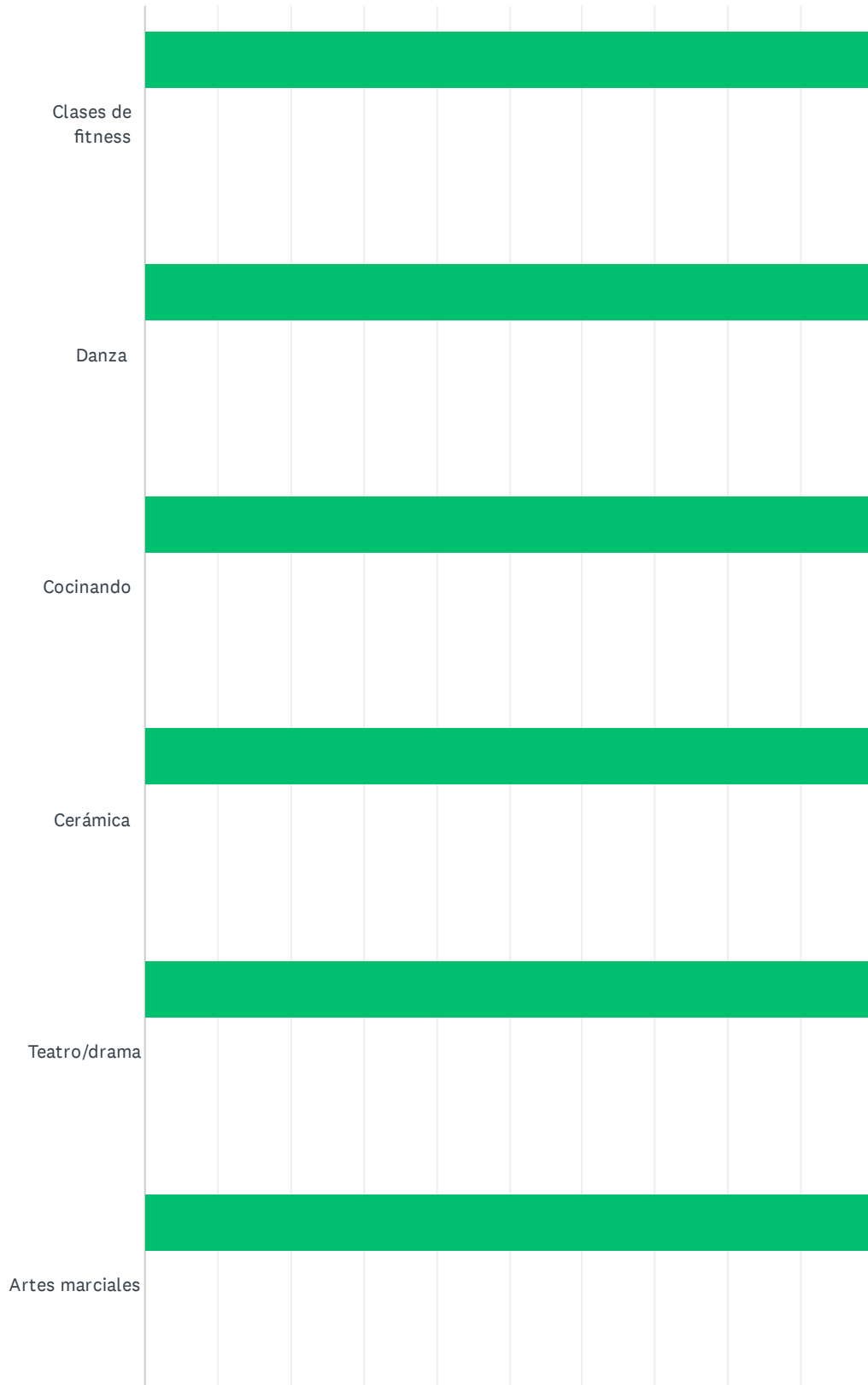


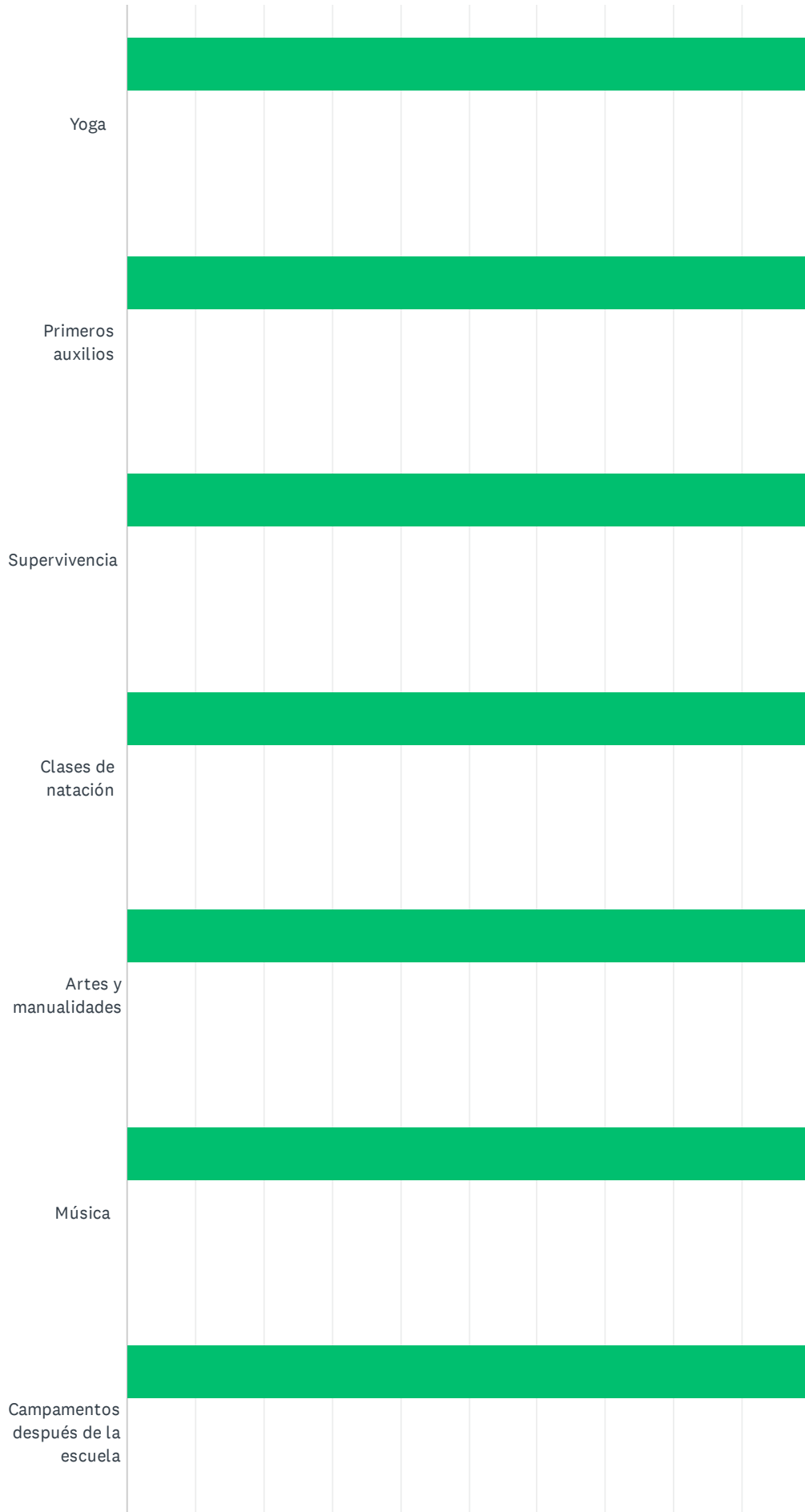


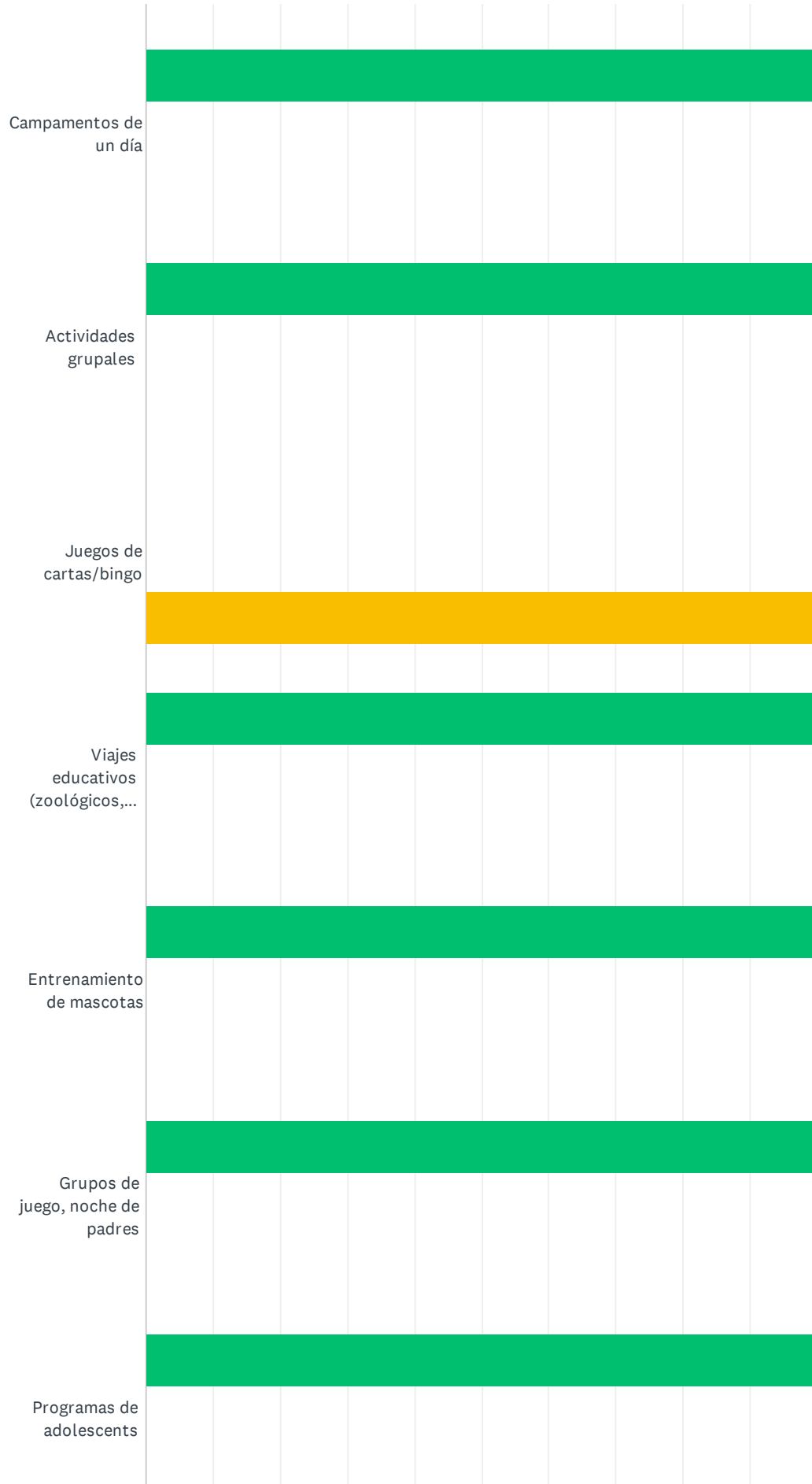
	EXTREMADAMENTE INTERESADO	MODERADAMENTE INTERESADO	NADA INTERESADO	TOTAL	WEIGHTED AVERAGE
Caminando	100.00% 1	0.00% 0	0.00% 0	1	3.00
Observación de la vida silvestre	100.00% 1	0.00% 0	0.00% 0	1	3.00
Picnic	100.00% 1	0.00% 0	0.00% 0	1	3.00
Conciertos al aire libre/ anfiteatro	100.00% 1	0.00% 0	0.00% 0	1	3.00
Pesca	100.00% 1	0.00% 0	0.00% 0	1	3.00
Canotaje/kayak	0.00% 0	0.00% 0	100.00% 1	1	1.00
Cámping	100.00% 1	0.00% 0	0.00% 0	1	3.00
Visitar sitios históricos	100.00% 1	0.00% 0	0.00% 0	1	3.00
Observación de aves	100.00% 1	0.00% 0	0.00% 0	1	3.00
Estudio de las estrellas	100.00% 1	0.00% 0	0.00% 0	1	3.00
Frisbee	0.00% 0	0.00% 0	100.00% 1	1	1.00
Gente mirando	100.00% 1	0.00% 0	0.00% 0	1	3.00
Asistir a reuniones familiares	100.00% 1	0.00% 0	0.00% 0	1	3.00
Jardinería	100.00% 1	0.00% 0	0.00% 0	1	3.00
Yoga/pilates	100.00% 1	0.00% 0	0.00% 0	1	3.00
Asistir a exposiciones de arte o festivales	100.00% 1	0.00% 0	0.00% 0	1	3.00
Estudio de la naturaleza	100.00% 1	0.00% 0	0.00% 0	1	3.00
Caminando por senderos interpretativos	100.00% 1	0.00% 0	0.00% 0	1	3.00
Fotografía	100.00% 1	0.00% 0	0.00% 0	1	3.00
Visitando un parque para perros	100.00% 1	0.00% 0	0.00% 0	1	3.00
Jugando en canchas de juego (bochas, herraduras, tejo)	100.00% 1	0.00% 0	0.00% 0	1	3.00

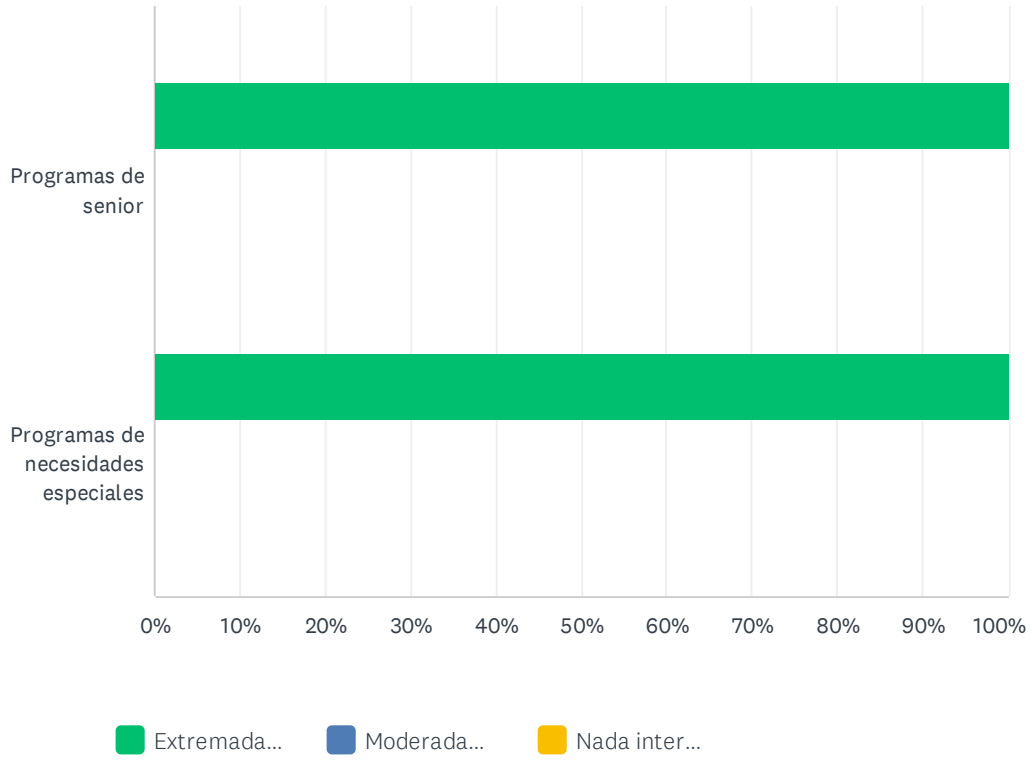
Q12 Califique su interés en las clases y programas enumerados a continuación:

Answered: 1 Skipped: 0





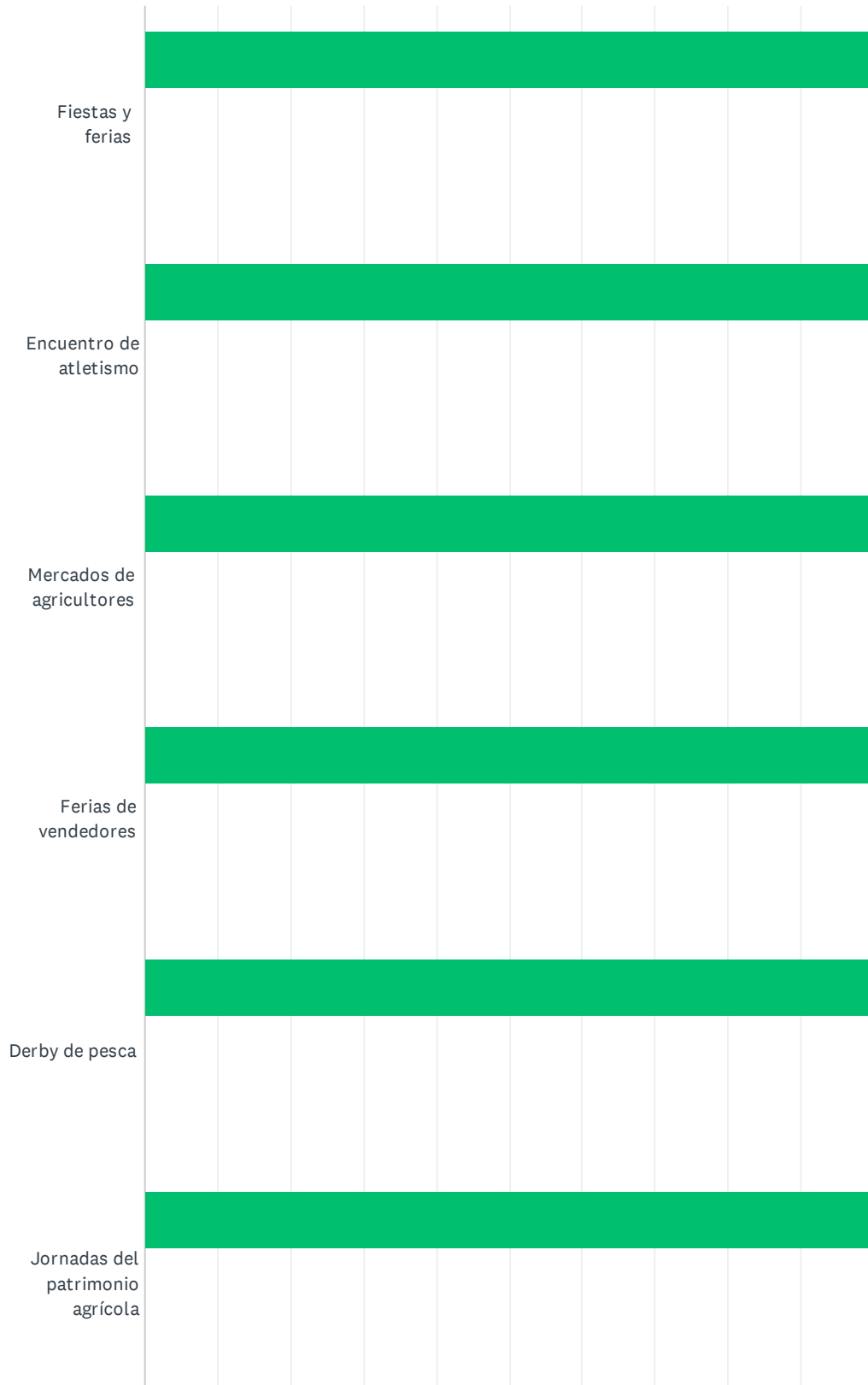


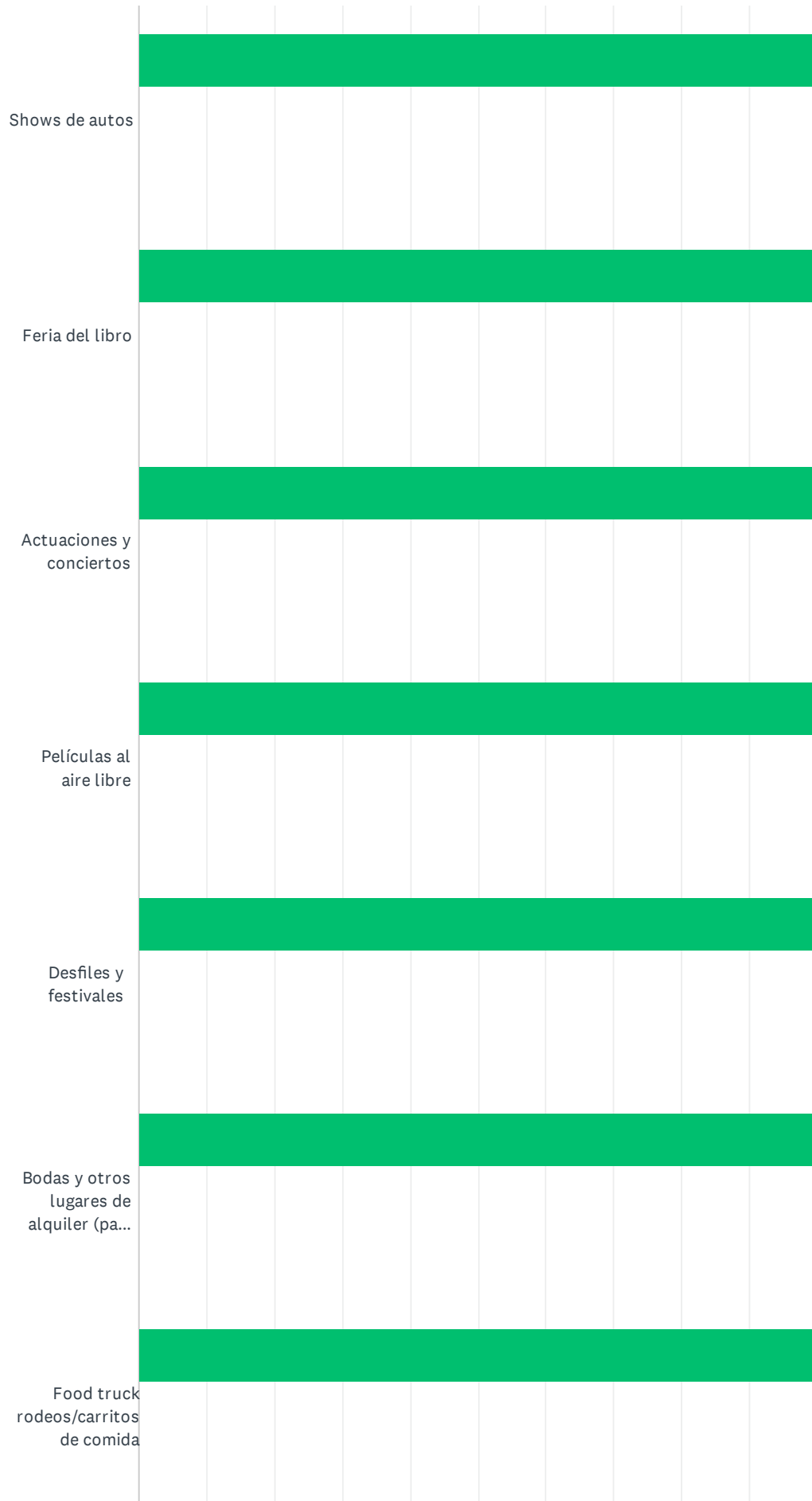


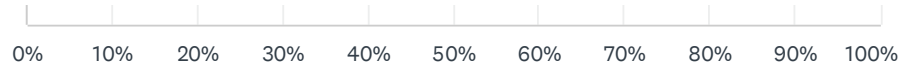
	EXTREMADAMENTE INTERESADO	MODERADAMENTE INTERESADO	NADA INTERESADO	TOTAL	WEIGHTED AVERAGE
Clases de fitness	100.00% 1	0.00% 0	0.00% 0	1	3.00
Danza	100.00% 1	0.00% 0	0.00% 0	1	3.00
Cocinando	100.00% 1	0.00% 0	0.00% 0	1	3.00
Cerámica	100.00% 1	0.00% 0	0.00% 0	1	3.00
Teatro/drama	100.00% 1	0.00% 0	0.00% 0	1	3.00
Artes marciales	100.00% 1	0.00% 0	0.00% 0	1	3.00
Yoga	100.00% 1	0.00% 0	0.00% 0	1	3.00
Primeros auxilios	100.00% 1	0.00% 0	0.00% 0	1	3.00
Supervivencia	100.00% 1	0.00% 0	0.00% 0	1	3.00
Clases de natación	100.00% 1	0.00% 0	0.00% 0	1	3.00
Artes y manualidades	100.00% 1	0.00% 0	0.00% 0	1	3.00
Música	100.00% 1	0.00% 0	0.00% 0	1	3.00
Campamentos después de la escuela	100.00% 1	0.00% 0	0.00% 0	1	3.00
Campamentos de un día	100.00% 1	0.00% 0	0.00% 0	1	3.00
Actividades grupales	100.00% 1	0.00% 0	0.00% 0	1	3.00
Juegos de cartas/bingo	0.00% 0	0.00% 0	100.00% 1	1	1.00
Viajes educativos (zoológicos, museos, etc.)	100.00% 1	0.00% 0	0.00% 0	1	3.00
Entrenamiento de mascotas	100.00% 1	0.00% 0	0.00% 0	1	3.00
Grupos de juego, noche de padres	100.00% 1	0.00% 0	0.00% 0	1	3.00
Programas de adolescents	100.00% 1	0.00% 0	0.00% 0	1	3.00
Programas de senior	100.00% 1	0.00% 0	0.00% 0	1	3.00
Programas de necesidades especiales	100.00% 1	0.00% 0	0.00% 0	1	3.00

Q13 Califique su interés en los eventos especiales que se enumeran a continuación:

Answered: 1 Skipped: 0





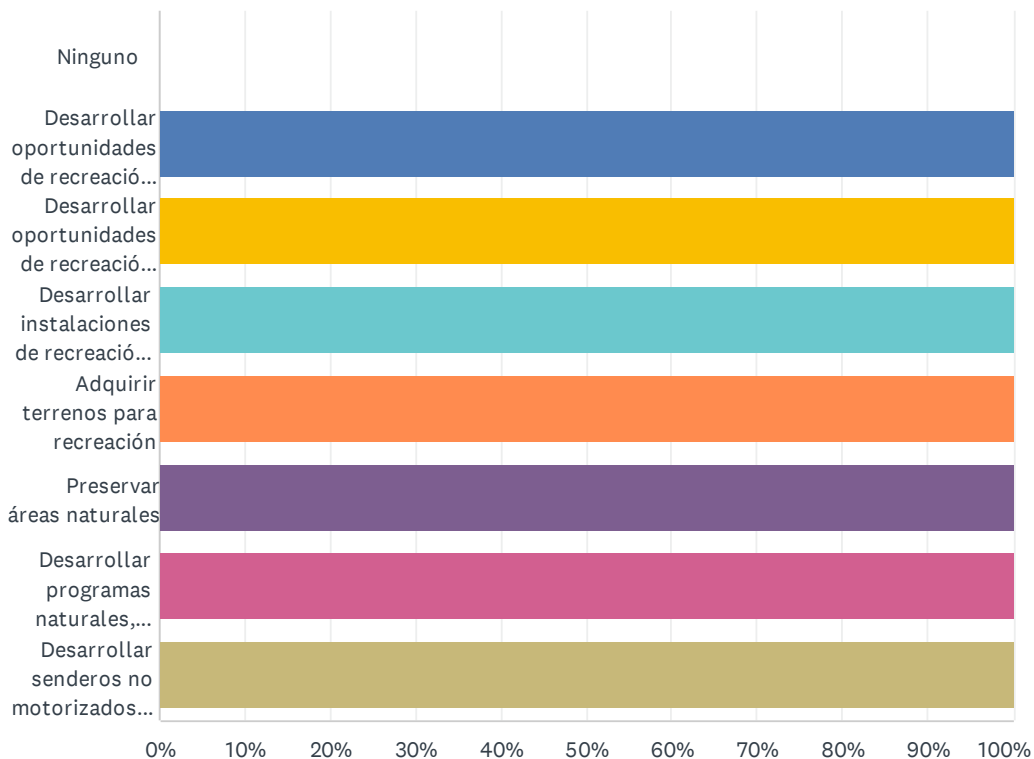


■ Extremada...
 ■ Moderada...
 ■ Nada inter...

	EXTREMADAMENTE INTERESADO	MODERADAMENTE INTERESADO	NADA INTERESADO	TOTAL	WEIGHTED AVERAGE
Fiestas y ferias	100.00% 1	0.00% 0	0.00% 0	1	3.00
Encuentro de atletismo	100.00% 1	0.00% 0	0.00% 0	1	3.00
Mercados de agricultores	100.00% 1	0.00% 0	0.00% 0	1	3.00
Ferias de vendedores	100.00% 1	0.00% 0	0.00% 0	1	3.00
Derby de pesca	100.00% 1	0.00% 0	0.00% 0	1	3.00
Jornadas del patrimonio agrícola	100.00% 1	0.00% 0	0.00% 0	1	3.00
Shows de autos	100.00% 1	0.00% 0	0.00% 0	1	3.00
Feria del libro	100.00% 1	0.00% 0	0.00% 0	1	3.00
Actuaciones y conciertos	100.00% 1	0.00% 0	0.00% 0	1	3.00
Películas al aire libre	100.00% 1	0.00% 0	0.00% 0	1	3.00
Desfiles y festivales	100.00% 1	0.00% 0	0.00% 0	1	3.00
Bodas y otros lugares de alquiler (para reuniones, fiestas de cumpleaños, otros eventos)	100.00% 1	0.00% 0	0.00% 0	1	3.00
Food truck rodeos/carritos de comida	100.00% 1	0.00% 0	0.00% 0	1	3.00

Q14 ¿Qué iniciativas debería priorizar la ciudad de Archer Lodge para su implementación futura? Marque todas las opciones que correspondan.

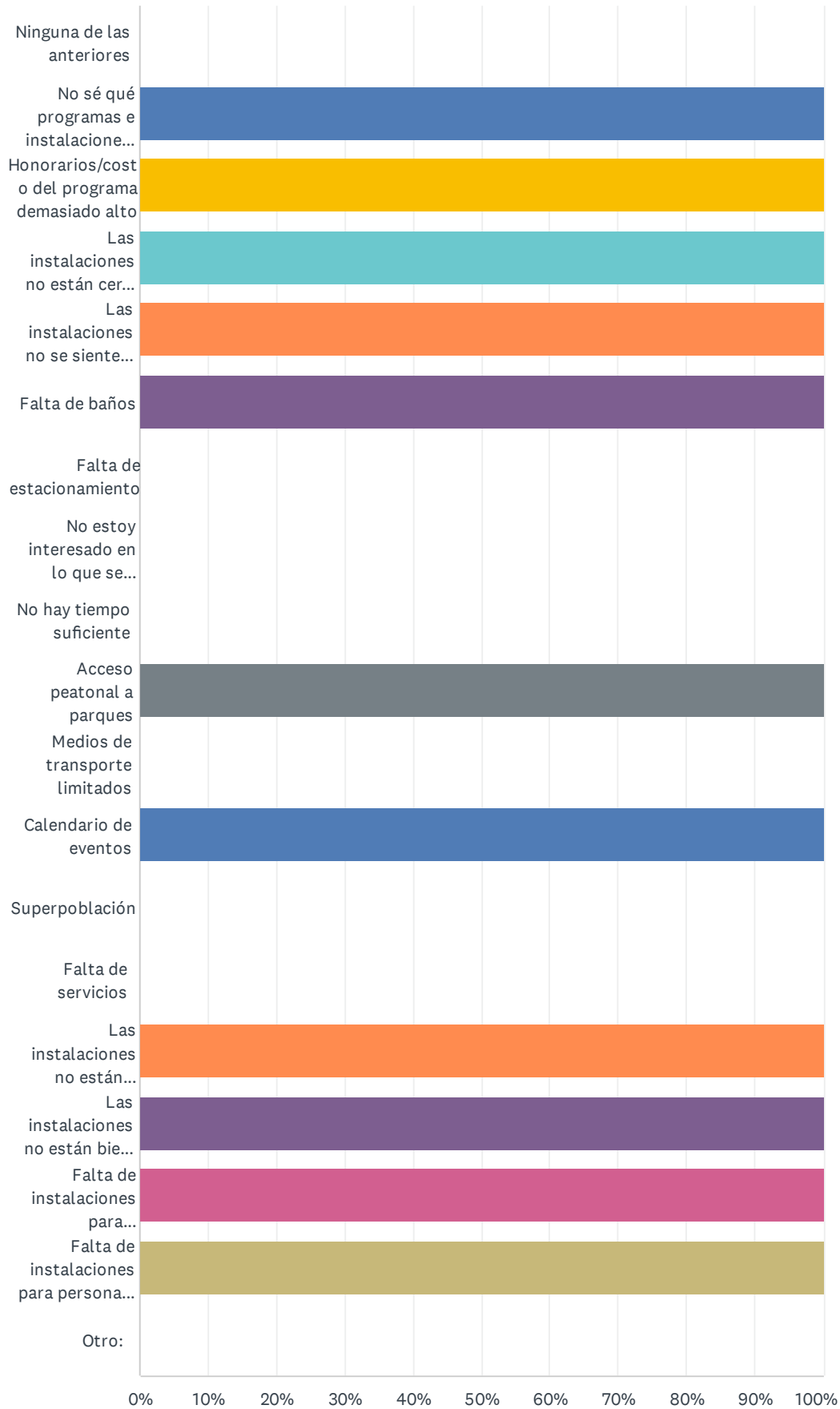
Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES
Ninguno	0.00% 0
Desarrollar oportunidades de recreación deportiva (campos de béisbol, fútbol, etc.)	100.00% 1
Desarrollar oportunidades de recreación relajante (senderismo, picnics, etc.)	100.00% 1
Desarrollar instalaciones de recreación en interiores (centro de recreación, gimnasios, piscinas, etc.)	100.00% 1
Adquirir terrenos para recreación	100.00% 1
Preservar áreas naturales	100.00% 1
Desarrollar programas naturales, históricos o culturales	100.00% 1
Desarrollar senderos no motorizados para caminar y andar en bicicleta que conecten escuelas, parques, vecindarios y otras instalaciones	100.00% 1
Total Respondents: 1	

Q15 ¿Cuál de las siguientes (si alguna) considera que son barreras para su participación en los programas e instalaciones recreativas de la ciudad de Archer Lodge? Seleccione todas las que correspondan.

Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES	
Ninguna de las anteriores	0.00%	0
No sé qué programas e instalaciones se ofrecen	100.00%	1
Honorarios/costo del programa demasiado alto	100.00%	1
Las instalaciones no están cerca de mi casa	100.00%	1
Las instalaciones no se sienten seguras	100.00%	1
Falta de baños	100.00%	1
Falta de estacionamiento	0.00%	0
No estoy interesado en lo que se proporciona	0.00%	0
No hay tiempo suficiente	0.00%	0
Acceso peatonal a parques	100.00%	1
Medios de transporte limitados	0.00%	0
Calendario de eventos	100.00%	1
Superpoblación	0.00%	0
Falta de servicios	0.00%	0
Las instalaciones no están actualizadas	100.00%	1
Las instalaciones no están bien mantenidas	100.00%	1
Falta de instalaciones para actividades en interiores	100.00%	1
Falta de instalaciones para personas con limitaciones físicas	100.00%	1
Otro:	0.00%	0
Total Respondents: 1		

#	OTRO:	DATE
	There are no responses.	

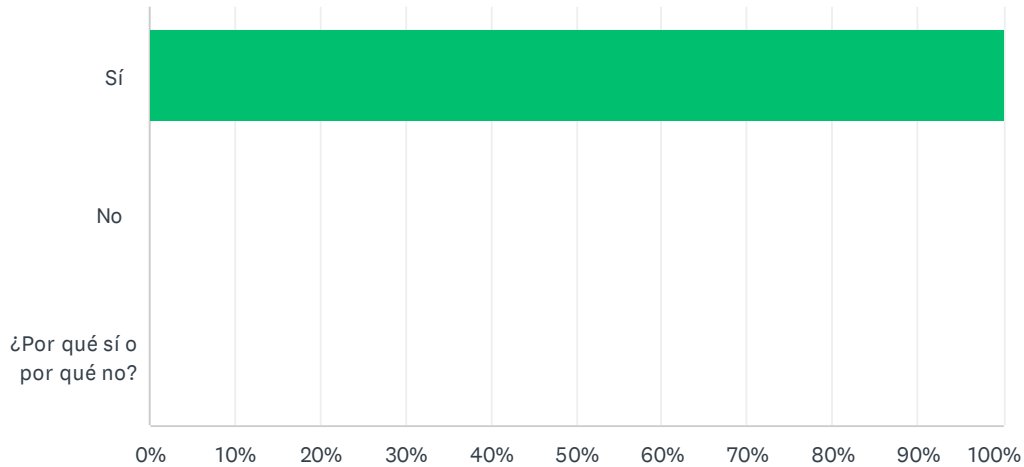
Q16 Enumere las ligas deportivas en las que haya participado durante los últimos 12 meses (sí tu respuesta es positiva, menciona cuáles):

Answered: 1 Skipped: 0

#	RESPONSES	DATE
1	Nada	11/24/2024 8:14 AM

Q17 ¿Estaría dispuesto a pagar tarifas más altas por más programas de recreación y / o instalaciones mejoradas?

Answered: 1 Skipped: 0

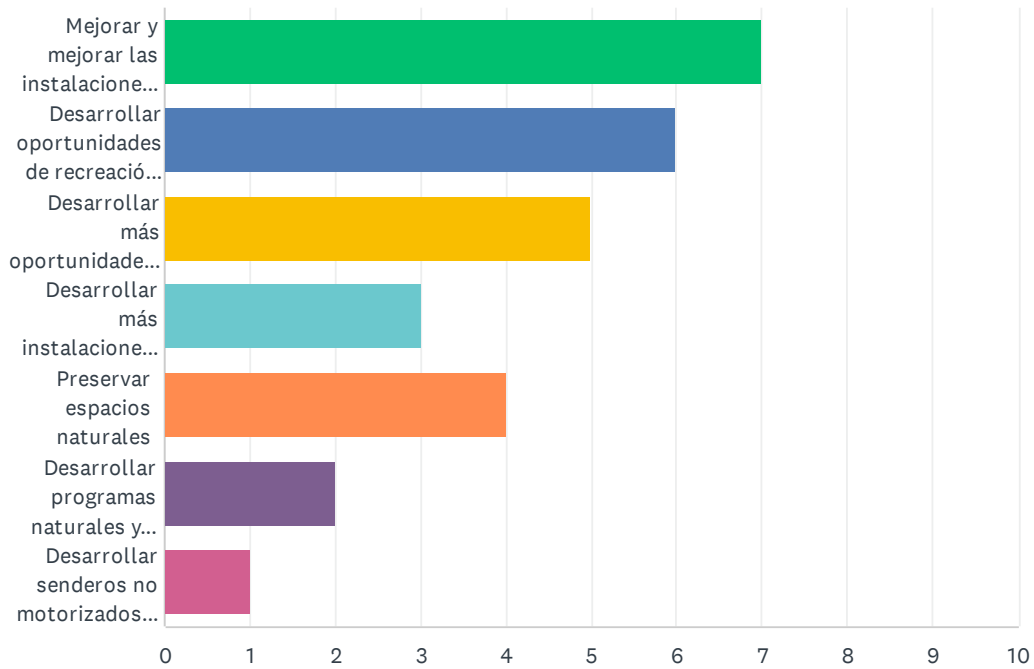


ANSWER CHOICES	RESPONSES	
Sí	100.00%	1
No	0.00%	0
¿Por qué sí o por qué no?	0.00%	0
TOTAL		1

#	¿POR QUÉ SÍ O POR QUÉ NO?	DATE
	There are no responses.	

Q18 Clasifique las siguientes iniciativas de la ciudad de Archer Lodge según su preferencia para la implementación futura de 1 (más preferido) a 7 (menos preferido):

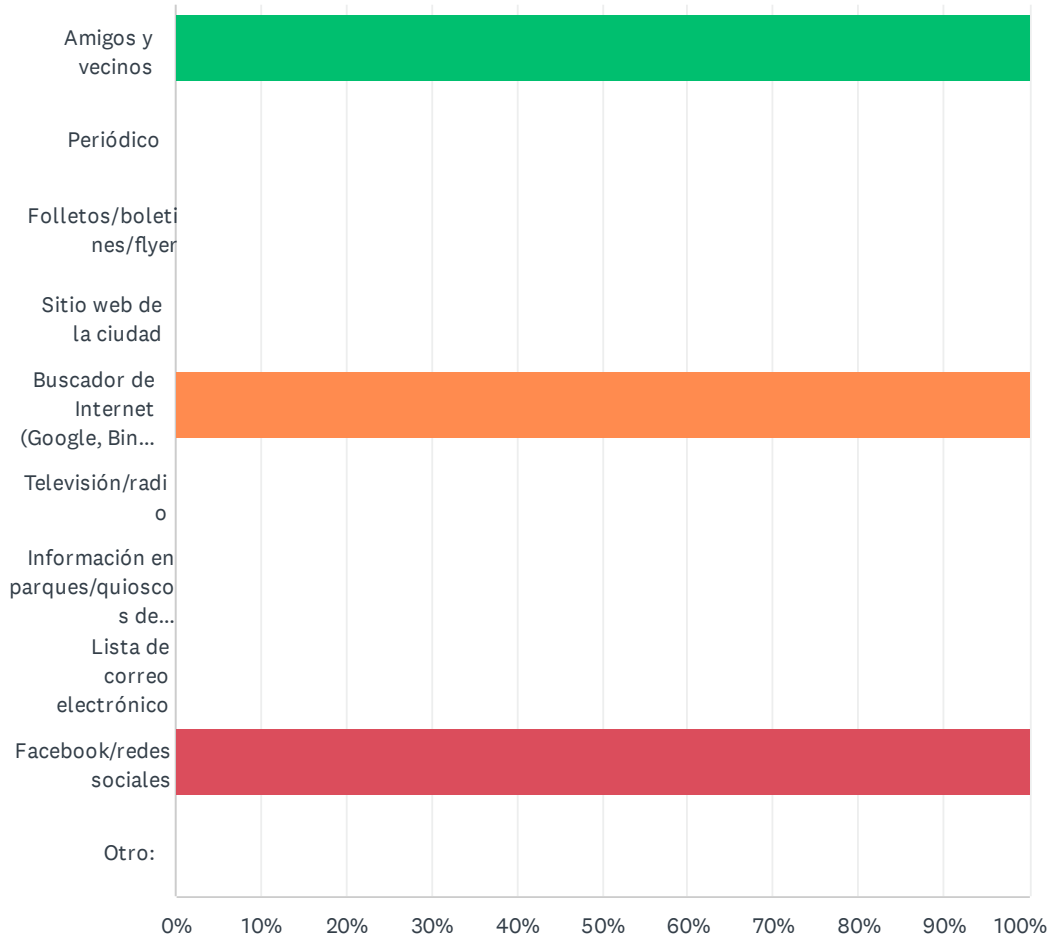
Answered: 1 Skipped: 0



	1	2	3	4	5	6	7	TOTAL	SCORE
Mejorar y mejorar las instalaciones existentes	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1	7.00
Desarrollar oportunidades de recreación más activas (campos de pelota, fútbol, etc.)	0.00% 0	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1	6.00
Desarrollar más oportunidades de recreación pasiva (senderismo, picnic, etc.)	0.00% 0	0.00% 0	100.00% 1	0.00% 0	0.00% 0	0.00% 0	0.00% 0	1	5.00
Desarrollar más instalaciones recreativas interiores (centro comunitario, gimnasios, piscinas, etc.)	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	0.00% 0	0.00% 0	1	3.00
Preservar espacios naturales	0.00% 0	0.00% 0	0.00% 0	100.00% 1	0.00% 0	0.00% 0	0.00% 0	1	4.00
Desarrollar programas naturales y históricos o culturales	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	0.00% 0	1	2.00
Desarrollar senderos no motorizados para caminar y andar en bicicleta que conectan escuelas, parques, vecindarios y otras instalaciones	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 1	1	1.00

Q19 ¿ Cómo te enteras o conoces sobre los parques y actividades recreativas en estos? Seleccione los 3 principales más importantes para su hogar:

Answered: 1 Skipped: 0

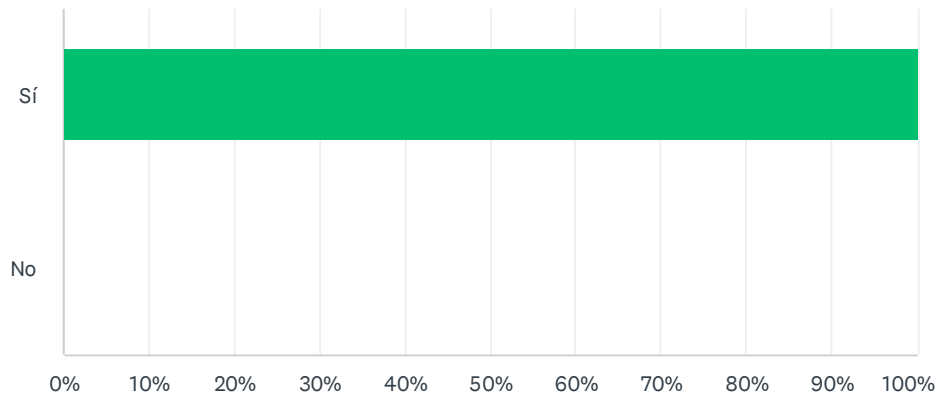


ANSWER CHOICES	RESPONSES
Amigos y vecinos	100.00% 1
Periódico	0.00% 0
Folletos/boletines/flyer	0.00% 0
Sitio web de la ciudad	0.00% 0
Buscador de Internet (Google, Bing, etc.)	100.00% 1
Televisión/radio	0.00% 0
Información en parques/quioscos de información	0.00% 0
Lista de correo electrónico	0.00% 0
Facebook/redes sociales	100.00% 1
Otro:	0.00% 0
Total Respondents: 1	

#	OTRO:	DATE
	There are no responses.	

Q20 ¿Vives dentro de los límites de la ciudad de Archer Lodge?

Answered: 1 Skipped: 0



ANSWER CHOICES	RESPONSES	
Sí	100.00%	1
No	0.00%	0
TOTAL		1

Q21 Código postal:

Answered: 1 Skipped: 0

#	RESPONSES	DATE
1	27591	11/24/2024 8:14 AM

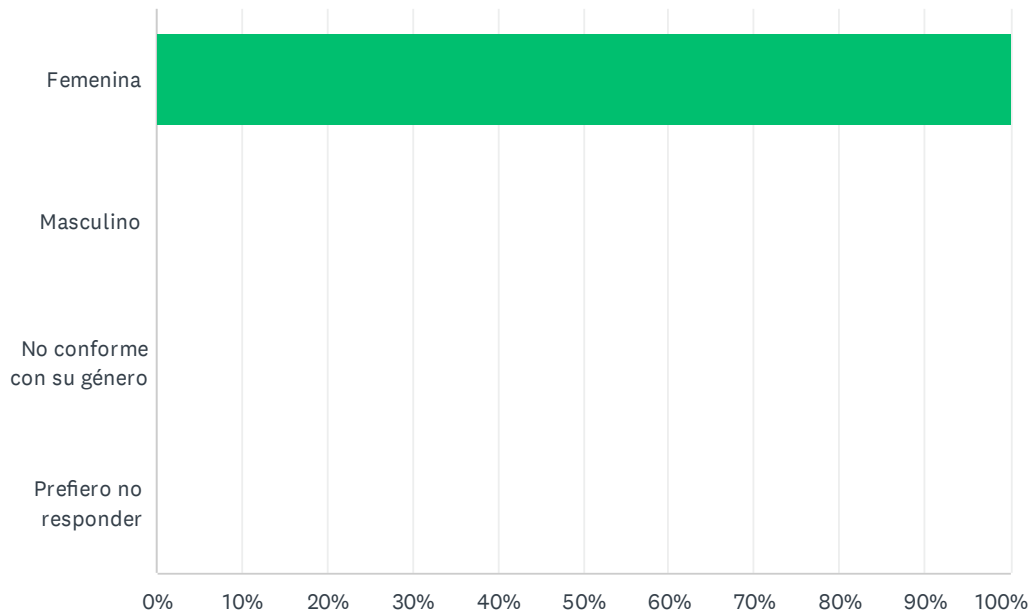
Q22 ¿Cuántos años has vivido en Archer Lodge?

Answered: 1 Skipped: 0

#	RESPONSES	DATE
1	1	11/24/2024 8:14 AM

Q23 ¿Cuál es su género?

Answered: 1 Skipped: 0

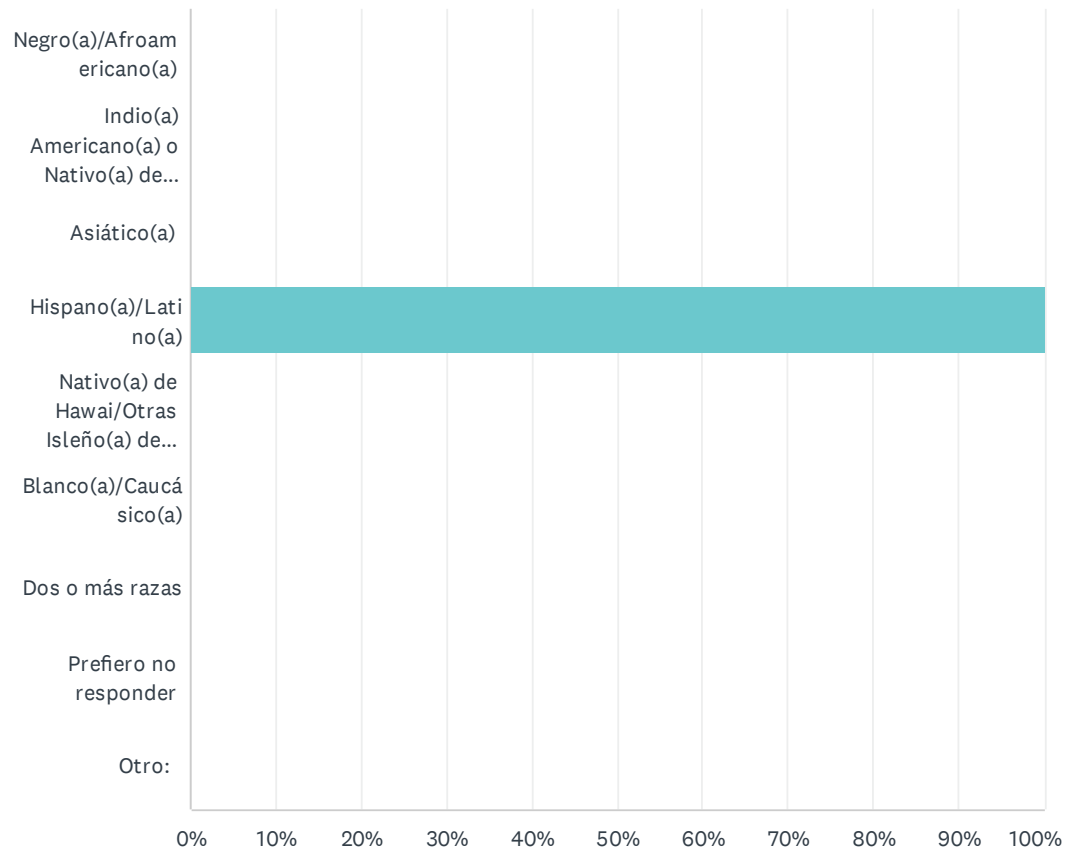


ANSWER CHOICES	RESPONSES
Femenina	100.00% 1
Masculino	0.00% 0
No conforme con su género	0.00% 0
Prefiero no responder	0.00% 0
TOTAL	1

#	PREFIERO AUTODESCRIBIRME	DATE
There are no responses.		

Q24 ¿Con qué grupo racial o étnico se identifica más?

Answered: 1 Skipped: 0

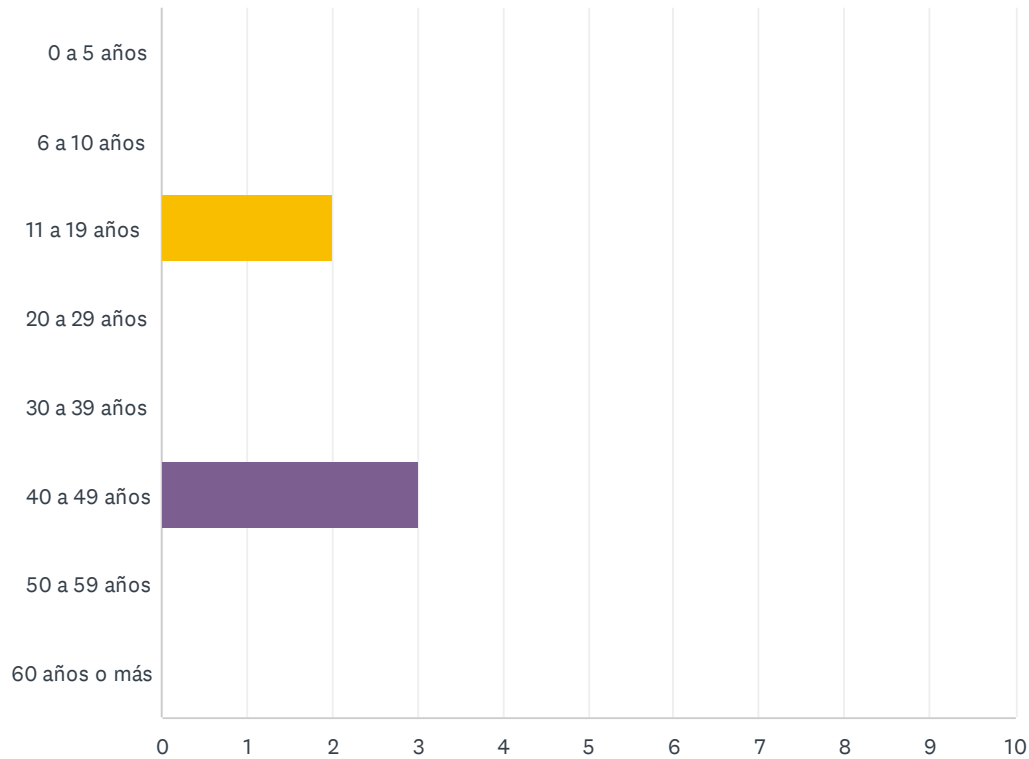


ANSWER CHOICES	RESPONSES
Negro(a)/Afroamericano(a)	0.00% 0
Indio(a) Americano(a) o Nativo(a) de Alaska	0.00% 0
Asiático(a)	0.00% 0
Hispano(a)/Latino(a)	100.00% 1
Nativo(a) de Hawai/Otras Isleño(a) del Pacífico	0.00% 0
Blanco(a)/Caucásico(a)	0.00% 0
Dos o más razas	0.00% 0
Prefiero no responder	0.00% 0
Otro:	0.00% 0
TOTAL	1

#	OTRO:	DATE
	There are no responses.	

Q25 Enumere a continuación el número de personas en su hogar, incluido usted, que se encuentran entre las edades que se enumeran a continuación:

Answered: 1 Skipped: 0



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
0 a 5 años	0	0	0
6 a 10 años	0	0	0
11 a 19 años	2	2	1
20 a 29 años	0	0	0
30 a 39 años	0	0	0
40 a 49 años	3	3	1
50 a 59 años	0	0	0
60 años o más	0	0	0
Total Respondents: 1			

#	0 A 5 AÑOS	DATE
	There are no responses.	
#	6 A 10 AÑOS	DATE

There are no responses.

#	11 A 19 AÑOS	DATE
1	2	11/24/2024 8:14 AM

There are no responses.

#	20 A 29 AÑOS	DATE

There are no responses.

#	30 A 39 AÑOS	DATE
1	3	11/24/2024 8:14 AM

There are no responses.

#	40 A 49 AÑOS	DATE

There are no responses.

#	50 A 59 AÑOS	DATE

There are no responses.

#	60 AÑOS O MÁS	DATE

There are no responses.

Q26 Por favor comparta cualquier pensamiento / comentario adicional:

Answered: 1 Skipped: 0

#	RESPONSES	DATE
1	N/a	11/24/2024 8:14 AM

Comprehensive Parks and Recreation Master Plan Update

D APPENDIX D: FUNDING OPPORTUNITIES AND CREATIVE PARTNERSHIPS

Grants and other potential federal, state, and private funding sources that the Town of Archer Lodge could utilize in the development of their future parks and recreation facilities are described below.

FEDERAL FUNDING SOURCES

LAND AND WATER CONSERVATION FUND

The Land and Water Conservation Fund (LWCF) is administered by the Department of the Interior, National Park Service. The fund provides matching grants for acquisition and development of public outdoor and recreation facilities. It can be used for community park and recreation facilities, including trails and greenways. Money is allocated through the State Division of Parks and Recreation. Fifty percent of the local project costs must be met through in-kind services or cash. Source: www.nps.gov/subjects/lwcf

RURAL SURFACE TRANSPORTATION GRANT

While smaller communities receive grants from a wide number of grant programs, including Mega and INFRA, the Rural program is dedicated specifically to projects in rural areas. Eligible projects for Rural grants include highway, bridge, and tunnel projects that help improve freight, safety, and provide or increase access to agricultural, commercial, energy, or transportation facilities that support the economy of a rural area. Source: www.transportation.gov/grants/rural-surface-transportation-grant-program

SURFACE TRANSPORTATION BLOCK GRANT PROGRAM

The Surface Transportation Block Grant (STBG) program provides flexible funding that may be used by States and localities for projects to preserve and improve the conditions and performance on any Federal-aid highway, bridge and tunnel projects on any public road, pedestrian and bicycle infrastructure, and transit capital projects, including intercity bus terminals. The STBG program funding is made available through the State transportation agencies. Surface Transportation Block Grant-Direct Attributable (STBG-DA) funds may be used for bicycle/

Comprehensive Parks and Recreation Master Plan Update

pedestrian projects, transit projects, or road projects. STBG-DA funds are administered through the MPO. Source: www.fhwa.dot.gov/specialfunding/stp

ACTIVE TRANSPORTATION INFRASTRUCTURE INVESTMENT PROGRAM

The Active Transportation Infrastructure Investment Program (ATIIP) has funds set aside to fund the planning, design, and construction of active transportation facilities. Specifically, the money can be used to build intra-community active transportation networks as well as regional “spines” that connect communities with each other. ATIIP will award two types of grants: Planning and Design grants and Construction grants. Source: www.fhwa.dot.gov/environment/bicycle_pedestrian/atiip

RECONNECTING COMMUNITIES PILOT PROGRAM

The Reconnecting Communities Pilot Program offers two grant types: capital construction and community planning. The objectives of the capital construction grants is to fund both reconnecting-focused projects and smaller projects focused on reducing environmental harm and improving access in disadvantaged communities. The community planning funds are for planning activities to support future construction projects and allow for innovative community planning to address localized transportation challenges. Projects may address community engagement activities or conceptual or preliminary engineering or design. Source: www.transportation.gov/grants/rcnprogram

SAFE STREETS FOR ALL

A new grant program through the Federal Highway Administration, Safe Streets for All (SS4A) provides grants directly to cities, towns, counties, transit agencies, MPOs and other regional agencies for Vision Zero policy and infrastructure initiatives to address safety issues for all users. Importantly, State Departments of Transportation are not eligible to apply, placing the impetus on local municipalities to develop projects and policies, and apply for funding. Funds may be put towards developing a Comprehensive Safety Action Plan, or planning, design, and implementation of projects and strategies identified in that Action Plan. Source: www.transportation.gov/grants/SS4A

WETLAND RESERVE PROGRAM

The Wetland Reserve Program is administered by the US Department of Agriculture's Natural Resource Conservation Service and offers technical and financial assistance to landowners who want to restore and protect wetland areas for water quality and wildlife habitat. The program pays private landowners who agree to place sensitive wetlands under permanent easements, and it can be used to fund protection of open space and greenways within riparian corridors. Source: www.ncwildlife.org/wildlife-habitat/conservation-restoration-programs/wetlands-reserve-program

ENVIRONMENTAL EDUCATION GRANTS PROGRAM (EPA)

The Environmental Education Grants Program is sponsored by the EPA's Environmental Education Division (EED) and provides funding for environmental education projects. The purpose of the program is to improve the public's awareness and knowledge, and create skills that help citizens make educated decisions that have an effect on environmental quality. Source: www.epa.gov/education/grants

NATIONAL ENDOWMENT FOR THE ARTS GRANT OPPORTUNITIES

The National Endowment for the Arts offers several federal grants that provide funding for public art. For a complete list of grant programs, refer to the website listed below. Source: www.arts.gov/grants

WATERSHED PROGRAM

The Watershed Program is implemented by the Natural Resources Conservation Service (NRCS). The program provides funding and technical assistance to states and local agencies to plan and implement projects that include soil conservation, flood prevention, utilization and disposal of water, and conservation and proper utilization of land. Source: www.nrcs.usda.gov/programs-initiatives/watershed-programs

CONSERVATION RESERVE ENHANCEMENT PROGRAM

The Conservation Reserve Enhancement Program (CREP) encourages farmers and landowners to enroll in long-term conservation contracts, removing environmentally sensitive land from agricultural production and implementing conservation practices. Participants receive annual rental

Comprehensive Parks and Recreation Master Plan Update

payments, cost-share assistance for establishing conservation practices, and other financial incentives. Source: www.fsa.usda.gov/resources/programs/conservation-reserve-enhancement-program-crep

TRANSPORTATION ALTERNATIVES

Transportation Alternatives (TA) is a new funding source under MAP-21 that consolidates three formerly separate programs under SAFETEA-LU: Transportation Enhancements (TE), Safe Routes to School (SR2S), and the Recreational Trails Program (RTP). These funds may be used for a variety of pedestrian, bicycle, and streetscape projects including sidewalks, bikeways, multiuse paths, and rail-trails.

The Safe Routes to School (SR2S) Program provides funding for both infrastructure-related and behavioral projects geared toward providing a safe, appealing environment for walking and/or biking that will improve the quality of children's lives and support national health objectives by reducing traffic, fuel consumption and air pollution in the vicinity of schools. Eligible projects may be undertaken on any public road, bicycle or pedestrian path or trail near schools and includes such improvements as sidewalk improvements, traffic calming/speed reduction, pedestrian/bicycle crossing, on-street bicycle facilities, off-street bicycle/pedestrian facilities, secure bicycle parking and traffic diversion.

The Recreational Trails Program (RTP) provides funding to develop, construct, rehabilitate and maintain trails for recreational purposes that include pedestrian, equestrian, and bicycling. Matching grants are available to eligible entities for development of trails for use by hikers, equestrians and/or mountain bikes.

Refer to the State Funding Sources section for specifics on how these funds are distributed in North Carolina.

STATE FUNDING SOURCES

SAFE ROUTES TO SCHOOL PROGRAM

Through the North Carolina Safe Routes to School program, the N.C. Department of Transportation works to make walking and riding a bicycle to school a safe and more appealing options for all children. The program facilitates the planning, development and implementation of projects and activities to improve safety and reduce traffic, fuel consumption and air quality near K-12 schools. The program includes Safe Routes to School Non-Infrastructure Program, a cost-reimbursement program for non-infrastructure programs and activities to local governments, regional planning organizations, schools, and other local or regional entities. Source: www.ncdot.gov/divisions/integrated-mobility/safety/Documents/safe-routes-to-school-description.pdf

RECREATIONAL TRAILS PROGRAM

The North Carolina Division of Parks and Recreation the Recreational Trails Program through its NC Trails Program. The grant is open to government agencies and non-profit organizations for trail construction and maintenance projects, trail side facilities construction and land acquisition for trails. Source: trails.nc.gov/trail-grants

GREAT TRAILS STATE PROGRAM

The Great Trails State Program provides funding for new trail development and extension of existing trails anywhere in the state of North Carolina. This includes paved trails or greenways, natural surface trails, biking trails, equestrian trails, and any other type of trail recognized by the Department of Natural and Cultural Resources. source: www.ncparks.gov/about-us/grants/great-trails-state-program

NORTH CAROLINA CLEAN WATER MANAGEMENT TRUST FUND

The NC Clean Water Management Trust Fund (CWMTF) is one of the largest sources of money in North Carolina for conservation, preservation and restoration of environmental and natural resources. The CWMTF provides funding for land acquisition, planning, and stormwater and wastewater projects. Source: www.cwmtf.net

Comprehensive Parks and Recreation Master Plan Update

NORTH CAROLINA PARKS AND RECREATION TRUST FUND

The NC Parks and Recreation Trust Fund (PARTF) is the leading source of funding for building and renovating recreation areas, and acquiring land for new and existing recreation areas in North Carolina. The PARTF requires a 50/50 match from local governments. The PARTF funds may be used for acquisition, development and renovation of recreational areas. Source: www.ncparks.gov/about-us/grants/parks-and-recreation-trust-fund

ACCESSIBILITY FOR PARKS GRANT

The Accessibility for Parks (AFP) program provides \$10 million for parks and recreation grants to benefit children and veterans with disabilities in North Carolina. Local governments, including some public authorities, are eligible to apply for the matching grants. The program is administered through the N.C. Division of Parks and Recreation and the N.C. Parks and Recreation Trust Fund. The matching grants can be used to build accessible facilities or adapt existing facilities that meet the unique needs of children and veterans with physical and developmental disabilities. Source: www.ncparks.gov/about-us/grants/accessibility-parks-grant

CONSERVATION TRUST FOR NORTH CAROLINA

The Conservation Trust for North Carolina (CTNC) is a non-profit organization working to protect areas with significant scenic, ecological, recreational, agricultural, historic or cultural value. The CTNC works with local land trusts around the state, including the Piedmont Land Conservancy and The Land Trust for Central North Carolina, in working with landowners to procure property or easements in significant areas, and to obtain grants and other funding for projects. Source: www.ctnc.org

THE NATURE CONSERVANCY

The North Carolina chapter of The Nature Conservancy (TNC) is a non-profit organization that works with individuals, businesses, communities, local governments and partner organizations to help protect the natural environment through a number of programs such as prescribed burns, conservation easements and working to address threats to biodiversity such as invasive plants and animals. TNC uses a scientific approach in selecting preservation areas, and works with land owners to

create conservation easements and develop programs to help the environment. Although TNC does not provide grants, they provide information and help in finding/acquiring funding for projects involving conservation. Source: www.nature.org

NC AGRICULTURAL DEVELOPMENT AND FARMLAND PRESERVATION TRUST FUND

The NC Agricultural Development and Farmland Preservation Trust Fund was established by the NC General Assembly. The fund protects farmland from development through the acquisition of the land for conservation easements. Source: www.ncagr.gov/adfp

AGRICULTURE COST SHARE PROGRAM

Administered by the NC Department of Agriculture and Consumer Services Division of Soil and Water Conservation, the NC Agriculture Cost Share Program (ACSP) helps address nonpoint source pollution by providing technical and financial resources for reducing runoff from agricultural lands through a voluntary, incentive-based program. The objective of the ACSP is to reduce nonpoint source pollution from agricultural land into the watercourses of the state. Source: www.resilienceexchange.nc.gov/find-funding/funding-database/agriculture-cost-share-program

WATER RESOURCE DEVELOPMENT PROJECT GRANT PROGRAM

The Water Resource Development Project Grant Program is administered by NCDENR's Division of Water Resources. The purpose of this program is to provide cost-share grants and technical assistance to local governments throughout the state. The program requires a minimum of 50% non-federal fund matching. It provides funding for projects in seven categories that include: general navigation, recreational navigation, water management, stream restoration, water-based recreation, Natural Resources Conservation Service Environmental Quality Incentives Program stream restoration projects and feasibility/engineering studies. Source: www.deq.nc.gov/about/divisions/water-resources/water-resources-grants/water-resources-development-grant-program

Comprehensive Parks and Recreation Master Plan Update

WETLANDS RESERVE ENHANCEMENT PROGRAM

The Wetlands Reserve Enhancement Program (WREP) is administered by the USDA Natural Resources Conservation Service to acquire and protect wetland, stream and riparian buffer areas to ensure their continued functioning in the areas of water quantity and quality control and as wildlife habitat. Source: www.nc.nrcs.usda.gov/programs/WRP/WREP.html

URBAN AND COMMUNITY FORESTRY FINANCIAL ASSISTANCE PROGRAM

The primary objective of the North Carolina Urban and Community Forestry (U&CF) Program is to assist municipalities with reaching a level of sustainable U&CF management that matches their goals and capacity. The program provides financial assistance and expertise in the development and completion of U&CF projects comprised of urban and community forestry practices and activities. Source: www.ncforestservation.gov/urban/urban_grant_program.htm

MULTIMODAL PLANNING GRANT PROGRAM

The NCDOT Integrated Mobility Division (IMD) and the Transportation Planning Division created an annual matching grant program – the Multimodal Planning Grant Program – to encourage municipalities to develop comprehensive bicycle plans and pedestrian plans. This program is currently administered through NCDOT-IMD. Source: connect.ncdot.gov/municipalities/PlanningGrants/IMD-Multimodal-Planning-Program

NC ARTS COUNCIL GRANT

The NC Arts Council, a division of the NC Department of Cultural Resources, provides numerous grants to nonprofit organization for arts programming. The NC Arts Council typically requires grant recipients to match funds one-to-one, and the funding can be used to hire accomplished artists to produce work or conduct programs. Source: www.ncarts.org

NC OFFICE OF ENVIRONMENTAL EDUCATION AND PUBLIC AFFAIRS

The NC Office of Environmental Education and Public Affairs keeps a regularly-updated listing of current grant opportunities relating to the natural environment. Source: www.eenorthcarolina.org/grants

PRIVATE FUNDING SOURCES

AMERICORPS NCCC

The AmeriCorps NCCC (National Civilian Community Corps) will partner with organizations such as non-profits, local municipalities and state governments to complete service projects including infrastructure improvement, environmental stewardship and conservation, urban and rural development. Source: www.americorps.gov

THE CONSERVATION FUND

The Conservation Fund is a non-profit organization that works with government agencies, land trusts, nonprofit organizations and others in helping to acquire and protect landscape with significant value for recreation, wildlife habitat or history. Source: www.conservationfund.org

PEOPLE FOR BIKES

People for Bikes' Bike Industry Community Grant Program supports bicycle infrastructure projects and targeted initiatives that make it easier and safer for people of all ages and abilities to bike. Source: www.peopleforbikes.org

STUDENT CONSERVATION ASSOCIATION

The Student Conservation Association (SCA) is a non-profit group consisting of young people giving hands-on service to national parks, cultural landmarks, and community green spaces. The SCA provides such services as trail maintenance and clearing, construction of erosion prevention structures, stream bank stabilization and invasive plant control. Source: www.thesca.org

AUDUBON NORTH CAROLINA

Audubon North Carolina is a grassroots organization which focuses on conserving and restoring natural habitats, with a major focus on the needs of birds. Audubon North Carolina utilizes science-based research and conservation, education, outreach and advocacy in an effort to improve natural habitats. Source: nc.audubon.org

DUCKS UNLIMITED

Ducks Unlimited (DU) is a grassroots, volunteer-based organization which focuses on conserving, restoring and managing wetlands and other habitats for waterfowl. DU

Comprehensive Parks and Recreation Master Plan Update

volunteers host grassroots fundraising events in order to raise unrestricted funds for high priority areas. Source: www.ducks.org

TRUST FOR PUBLIC LAND

The Trust for Public Land (TPL) is a national non-profit organization that helps agencies and communities identify and generate funds for conservation from federal, state, local and philanthropic sources. TPL does not provide any grants or funding. Source: www.tpl.org

Project Costs
Archer Lodge Town Park Inclusive Playground – Town of Archer Lodge
February 2025

Project Elements	Unit	Unit Cost	Total Item Cost
Building Costs			
Playground (3,500SF, includes earthwork, equipment, surfacing, subsurface drainage, signage, edging)	Lump Sum	\$365,000	\$365,000
Cost to Build			\$365,000
Contingency for the Cost of Building			
Contingency (not to exceed 5% of the cost to build or renovate)	5%		\$18,250
Planning Costs (not to exceed 20% of the cost of the project)	5.6%		\$20,340
Total Project Cost			\$403,590
Total Accessible Parks Grant Request			\$336,325
Total Local Match			\$67,265



Budget Planning Retreat - Minutes Monday, February 17, 2025

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Buzzelli
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Kim P. Batten, Asst. Town Administrator/Finance Officer
Jason Kress, Town Planner
Marcus Burrell, Town Attorney
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

Council Member Bruton (left meeting early before item 4)

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

- a) Mayor Mulhollem called the Budget Retreat/Work Session to order at 6:35 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present.

2. AUDIT PRESENTATION FOR FISCAL YEAR ENDING JUNE 30, 2024 ~ MR. DALE PLACE OF MAY & PLACE, PA

4 - 70

- a) Dale Place of May & Place, PA explained the audit report starting by going through the table of contents and giving a brief summary of each item. After providing the general information surrounding the completion of the audit, he asked Council to pay attention to Page 20, Exhibit 3. This page shows that the Town is below the threshold for fund balance. He also asked Council to look at the additional hand out that was provided, that gives an idea of what reserve of cash is available. The Town is below the minimum threshold for this amount as well. Mr. Place encouraged Council to look at these issues and to keep them in mind for the next budget. He said for the next budget the Town needs to increase revenue, cut expenditures, or both in order to be able to reach the thresholds. Mr. Place explained that it was not an emergency but it is something to keep in mind. He expressed thanks to staff for always cooperating and making the audit a smooth process like always. Kim Batten, Assistant Town Administrator/Finance Officer asked Mr. Place to address Page 13 and where the previous year would have been if the Town would not have received the grants that it did. He shared that the capital grants and contributions was approximately 2.6 million in revenue. He was unsure if the Town would have broken even without the capital grants and contributions due to the expenses associated with the grants and matches. He is hopeful that the threshold can be met within the next year; however, if it is not the Town should beware that the Local Government Commission may be sending letters regarding the lack of funds.

[2024 Audit Report](#)

3. NORTH SIDE FIRE & RESCUE DEPARTMENT UPDATE ~ MR. PHILLIP DRIVER, CHIEF

- a) **Chief Phillip Driver gave a Fire Department update. From last year to this year the fire department has grown by 8 employees (3 full-time, 5 part-time, 0 volunteer). Calls were up this year with 319 calls in Archer Lodge, last year there were 292 calls. Currently there are 3 apparatus staff. They purchased a used ladder truck and it will be in service July 1st if they are able to find staff to man the new truck. The fire department raised the benefit package to put a little more into the retirement to attract people to come in to work in Archer Lodge. Since the station has started full-time in 2016 they have only lost 3 employees, so there is barely any turn over. For staff there is 33 fireman, and 1 secretary. Northside Fire has another station on Thanksgiving Fire Road, and is looking for another plot of land to build a third station. There will be a tax increase seen and the number should be released soon so the Town can know how to budget. This is based on a formula for miles, call volume, population, and square foot of residence.**
-

4. PLANNING DISCUSSION CONTINUED:

- a) **Bryan Chadwick shared a list that he received from Council Member Buzzelli.**
- Mr. Chadwick asked Council if anyone had any opening statements regarding the document. Council Member Buzzelli requested to wait until Council Member Bruton was present as she had just left the meeting. Mr. Chadwick explained that they cannot move forward without discussing this topic. He shared that the preliminary budget will be put out in March and that it is up to the Members of Council to come meet with him directly about anything in the budget. He stated that his goal is to fulfill his job duties by getting the budget out and the budget created based on the decisions that were made at previous meetings. Mr. Chadwick explained that the list itself of requests is changing several of those things, which is the reason why the discussion had to be held at this meeting so that the preliminary budget would be accurate.
 - Mr. Chadwick, Ms. Batten, and Ms. Martin explained each item line by line to address each one of Council Member Buzzelli's concerns. Discussion followed for each item. Discussion heavily focused on the topic of Human Resources, Town Clerk, Deputy Clerk, and what the roles should be for those positions. Discussion regarding the reclassification of the Deputy Clerk role and the desire for Council to have held a vote to determine if the reclassification was necessary. Many members of the Council expressed that they don't see a need to have an individual position that is dedicated to Human Resources.
 - Ms. Joyce Lawhorn, the previous Deputy Clerk, asked permission to speak and share that her job and responsibilities required more time than what her job description implied and that in her opinion, it seems that Members of the Council assume that there should be a quick turn around on certain items such as minutes when there is a lot of time spent doing other duties.
 - Mr. Chadwick shared that his schedule for the next two weeks will be open to ensure that he can meet with the Council Members to discuss their feelings about the budget. He explained that meeting with them individually is imperative to the success to the budget and ensures that the Council and Town Administrator are on the same page for the budget.
 - Mayor Mulhollem thanked the staff and Council for participating in the conversation as time is of the essence to ensure that the budget can be presented on time. He shared that he is aware that some of the

topics are uncomfortable to speak about but generally being able to speak about them is positive to be able to move forward.

- Mr. Allen shared that for himself he is not sure what the future for the Town entails as he doesn't hear any direction from the council. Mayor Mulhollem agreed that it is unfair for the employees to be uncertain due to lack of decision making. Mayor Mulhollem shared that he does not want a repeat of last year. He also encouraged the Council to meet with Mr. Chadwick as well as the other members of the staff to make sure that Council has a good understanding of what is going on in each department.

5. ADJOURNMENT:

- a) With no further business, Mayor Mulhollem adjourned the meeting at 9:35 p.m.**
-

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk

TOWN OF ARCHER LODGE

NORTH CAROLINA

ANNUAL FINANCIAL REPORT

Town Council Members

Matthew B. Mulhollem, Mayor
Clyde B. Castleberry, Mayor Pro-Tem
Teresa M. Bruton
J. Mark Jackson
James L. (Jim) Purvis, III
Mark B. Wilson

Administrative and Financial Staff

Bryan Chadwick, Town Administrator/Budget Officer
Kim P. Batten, Assistant Town Administrator/Finance Officer
Jenny Martin, Town Clerk/Human Resources Officer

FOR THE FISCAL YEAR ENDED JUNE 30, 2024

Town of Archer Lodge, North Carolina
Table of Contents
June 30, 2024

	<u>Page</u>
Financial Section:	
Independent Auditor’s Report	5-7
Management’s Discussion and Analysis	9-16
Basic Financial Statements	
Government-wide Financial Statements:	
Statement of Net Position – Exhibit 1	18
Statement of Activities – Exhibit 2	19
Fund Financial Statements:	
Balance Sheet – Governmental Funds – Exhibit 3	20
Reconciliation of the Governmental Funds Balance Sheet to the Statement of Net Position- Exhibit 3	21
Statement of Revenues, Expenditures, and Changes in Fund Balances – Governmental Funds – Exhibit 4	22
Reconciliation of the Statement of Revenues, Expenditures, and Changes in Fund Balances of Governmental Funds to the Statement of Activities – Exhibit 4 (cont.)	23
Statement of Revenues, Expenditures, and Changes in Fund Balance – General Fund – Budget and Actual – Exhibit 5	24
Notes to Financial Statements	26-44
Required Supplemental Financial Data:	
Schedule of the Proportionate Share of the Net Position Asset Local Government Employees’ Retirement System	46
Schedule of Contributions Local Government Employees’ Retirement System	47
Individual Fund Statements and Schedules	
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual – General Fund	49-52
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual-Regional Economic Development Research Fund	53
Combining Balance of Non-Major Governmental Funds	54
Combining Statement of Revenues, Expenditures, and Changes in Fund Balance Non-Major Governmental Funds	55
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual – Park Reserve Fund	56
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual – Capital Project Fund-Town Park	57
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual – Capital Reserve Fund	58
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual –American Rescue Plan Project Fund	59
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual –State Capital & Infrastructure Fund	60
Schedule of Revenues, Expenditures, and Changes in Fund Balance Budget and Actual – Public Safety Reserve Fund	61

Other Schedules:

Schedule of Ad Valorem Taxes Receivable	63
Analysis of Current Tax Levy – Town-Wide Levy	64

Compliance Section

Independent Auditor’s Report on Internal Control Over Financial Reporting and on Compliance and other Matters Based on an Audit of Financial Statements Performed in Accordance with <i>Government Auditing Standards</i>	66-67
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FINANCIAL SECTION

May & Place, PA

CERTIFIED PUBLIC ACCOUNTANTS

P.O. Box 900
Louisburg, NC 27549
Bus: 919-496-3041
Fax: 919-496-6342

SCOTT H. MAY, CPA
DALE R. PLACE, CPA, CFE

Independent Auditor's Report

To the Honorable Mayor and
Members of the Town Council
Archer Lodge, North Carolina

Report on Audit of Financial Statements

Opinions

We have audited the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information for the Town of Archer Lodge, North Carolina, as of and for the year ended June 30, 2024, and the related notes to the financial statements, which collectively comprise the Town of Archer Lodge's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, each major fund, and the aggregate remaining fund information for the Town of Archer Lodge as of June 30, 2024, and the respective changes in financial position, and the respective budgetary comparison for the General Fund and major, annually budgeted special revenue funds for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Town of Archer Lodge and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Audit of the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raises substantial doubt about the Town of Archer Lodge's ability to continue as a going concern for the twelve months beyond the financial statement date, including any currently known

information that may raise substantial doubt shortly thereafter.

Auditor's Responsibility for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free of material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Governmental Auditing Standards* will always detect material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Governmental Auditing Standards*, we

- Exercised professional judgment and maintained professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Town of Archer Lodge's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Town of Archer Lodge's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis on pages 9 through 16, and the Local Government Employees' Retirement System's Schedules of the Proportionate Share of the Net Pension Liability (Asset) and Contributions, on pages 46 through 47, respectively, be presented to supplement the basic financial statements. Such information is the responsibility of management, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of the financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with the auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with enough evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Town of Archer Lodge's basic financial statements. The combining and individual non-major fund financial statements, budgetary schedules, and other schedules are presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the combining and individual fund financial statements, budgetary schedules, and other schedules are fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information

Management is responsible for the other information included in the annual report. The other information comprises the introductory information and the statistical sections but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report date December 12, 2024, on our consideration of the Town of Archer Lodge's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Town Archer Lodge's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Town of Archer Lodge's internal control over financial reporting and compliance.

May & Place, PA

May & Place, PA
Louisburg, NC
December 12, 2024

Management's Discussion and Analysis

Management's Discussion and Analysis

As management of the Town of Archer Lodge, we offer readers of the Town of Archer Lodge's financial statements this narrative overview and analysis of the financial activities of the Town of Archer Lodge for the fiscal year ended June 30, 2024. We encourage readers to read the information presented here in conjunction with additional information that we have furnished in the Town's financial statements, which follow this narrative.

Financial Highlights

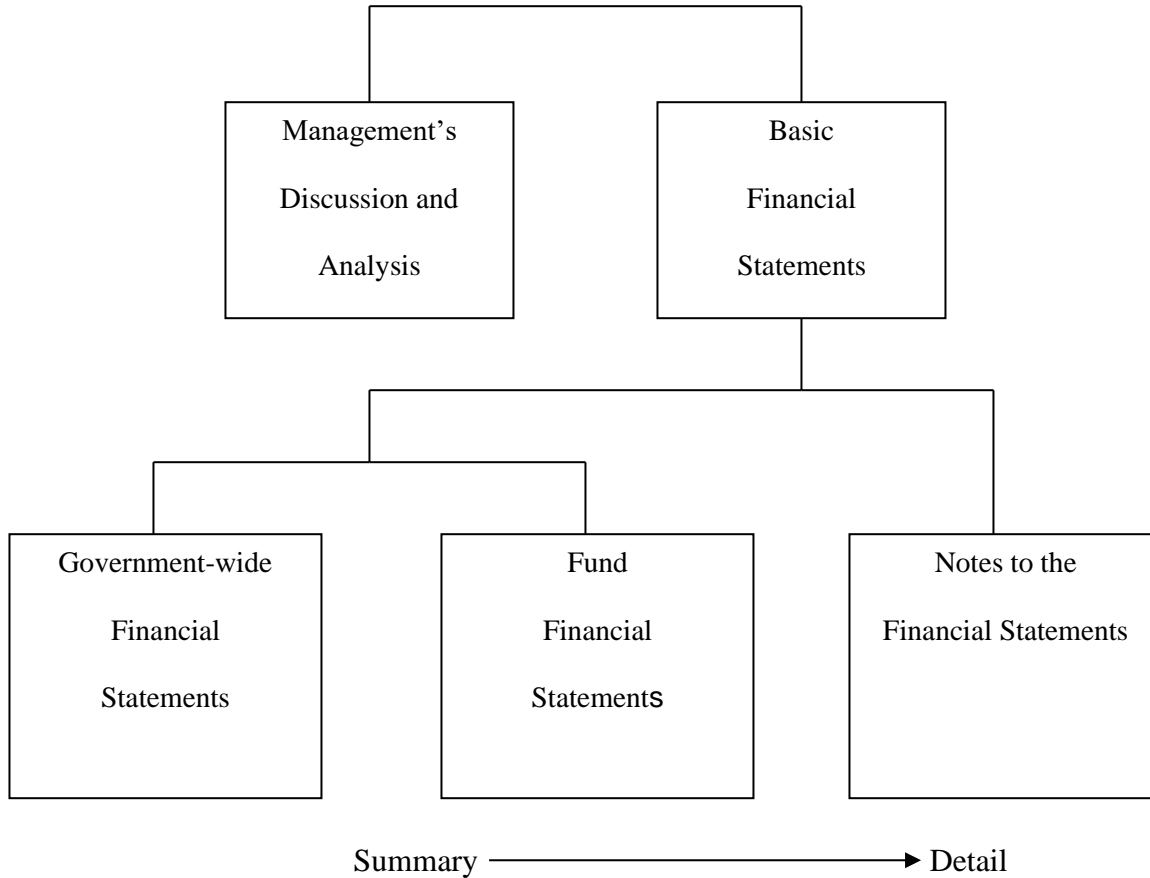
- The assets and deferred outflows of resources of the Town of Archer Lodge exceeded its liabilities and deferred inflows of resources at the close of the fiscal year by \$8,652,295 (*net position*).
- The government's total net position increased by \$2,482,195.
- As of the close of the current fiscal year, the Town of Archer Lodge's governmental funds reported combined ending fund balances of \$4,522,431 with a net increase of \$1,525,168 in fund balances.
- Approximately 10.4% of this total fund balance, or \$469,173, is non-spendable or restricted.
- At the end of the current fiscal year, the unassigned fund balance for the General Fund was \$1,019,600 or 37% of total general fund expenditures for the fiscal year.
- The Town of Archer Lodge's total debt decreased by \$123,191 (18%) during the current fiscal year.
- The investment earnings from investing temporarily idle cash with NC Capital Management Trust increased by 73% due to additional funds received from state grants and higher investment interest rates.
- Received \$2,365,000 NC Regional Economic Development Research grant for continued park development.
- Had a groundbreaking ceremony for the new Town of Archer Lodge Recreation Park in March 2024.
- Continued work on phases 2 and 3 of the Park to include additional restroom facilities, pickle ball courts, multi-purpose fields, parking areas, and a parks maintenance facility.
- Continued partnerships with the Johnston County public schools, Archer Lodge Community Center, and Johnston County Little League to provide expanded recreational opportunities within the Town.

Overview of the Financial Statements

This discussion and analysis are intended to serve as an introduction to Town of Archer Lodge's basic financial statements. The Town's basic financial statements consist of three components: 1) government-wide financial statements, 2) fund financial statements, and 3) notes to the financial statements (see Figure 1). The basic financial statements present two different views of the Town through the use of government-wide statements and fund financial statements. In addition to the basic financial statements, this report contains other supplemental information that will enhance the reader's understanding of the financial condition of the Town of Archer Lodge.

Required Components of Annual Financial Report

Figure 1



Basic Financial Statements

The first two statements (Exhibits 1 and 2) in the basic financial statements are the **Government-wide Financial Statements**. They provide both short and long-term information about the Town's financial status.

The next statements (Exhibits 3 through 5) are **Fund Financial Statements**. These statements focus on the activities of the individual parts of the Town's government. These statements provide more detail than the government-wide statements. There are two parts to the Fund Financial Statements: 1) the governmental funds statements; and 2) the budgetary comparison for major governmental funds.

The next section of the basic financial statements is the **notes**. The notes to the financial statements explain in detail some of the data contained in those statements. After the notes, **supplemental information** is provided to show details about the Town's individual funds. Budgetary information required by the General Statutes can also be found in this part of the statements.

Government-Wide Financial Statements

The government-wide financial statements are designed to provide the reader with a broad overview of the Town's finances, similar in format to a financial statement of a private-sector business. The government-wide statements provide short and long-term information about the Town's financial status as a whole.

The two government-wide statements report the Town's net position and how they have changed. Net position is the difference between the Town's total assets and deferred outflows of resources and total liabilities and deferred inflows of resources. Measuring net position is one way to gauge the Town's financial condition.

The government-wide statements are comprised of the governmental activities. The governmental activities include all of the Town's basic services such as general government, public safety, and parks and recreation. Property taxes and state-shared revenues finance most of these activities.

The government-wide financial statements are on Exhibits 1 and 2 of this report.

Fund Financial Statements

The fund financial statements (see Figure 1) provide a more detailed look at the Town's most significant activities. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The Town of Archer Lodge, like all other governmental entities in North Carolina, uses fund accounting to ensure and reflect compliance (or non-compliance) with finance-related legal requirements, such as the General Statutes or the Town's budget ordinance. All the funds of the Town of Archer Lodge are classified as governmental funds.

Governmental Funds – Governmental funds are used to account for those functions reported as governmental activities in the government-wide financial statements. Most of the Town's basic services are accounted for in governmental funds. These funds focus on how assets can readily be converted into cash flow in and out, and what monies are left at year-end that will be available for spending in the next year. Governmental funds are reported using an accounting method called *modified accrual accounting* which provides a short-term spending focus. As a result, the governmental fund financial statements give the reader a detailed short-term view that helps him or her determine if there are more or less financial resources available to finance the Town's programs. The relationship between government activities (reported in the Statement of Net Position and the Statement of Activities) and governmental funds is described in a reconciliation that is a part of the fund financial statements.

The Town of Archer Lodge adopts an annual budget for its General Fund, as required by the General Statutes. The budget is a legally adopted document that incorporates input from the citizens of the Town, the management of the Town, and the decisions of the Board about which services to provide and how to pay for them. It also authorizes the Town to obtain funds from identified sources to finance these current period activities. The budgetary statement provided for the General Fund demonstrates how well the Town complied with the budget ordinance and whether or not the Town succeeded in providing the services as planned when the budget was adopted. The budgetary comparison statement uses the budgetary basis of accounting and is presented using the same format, language, and classifications as the legal budget document. The statement shows four columns: 1) the original budget as adopted by the board; 2) the final budget as amended by the board; 3) the actual resources, charges to appropriations, and ending balances in the General Fund; and 4) the difference or variance between the final budget and the actual resources and charges.

Notes to the Financial Statements – The notes provide additional information that is essential to a full understanding of the data provided in the government-wide and fund financial statements.

Other Information – In addition to the basic financial statements and accompanying notes, this report includes certain required supplementary information concerning the Town’s progress in funding its obligations to provide pension benefits to its employees. Required supplementary information can be found in this report.

Interdependence with Other Entities – The Town depends on financial resources flowing from or associated with both the federal government and the State of North Carolina. Because of this dependency, the Town is subject to changes in specific flows of intergovernmental revenues based on modifications to federal and State laws and appropriations. It is also subject to changes in investment earnings and asset values associated with U.S. Treasury Securities because of actions by foreign governments and other holders of publicly held U.S. Treasury Securities.

Government-Wide Financial Analysis

Town of Archer Lodge’s Net Position

Figure 2

	<u>Governmental Activities</u>		<u>Total</u>	
	<u>2024</u>	<u>2023</u>	<u>2024</u>	<u>2023</u>
Current and other assets	\$ 4 633 808	\$ 3 482 751	\$ 4 633 808	\$ 3 482 751
Capital assets	4 732 386	3 872 906	4 732 386	3 872 906
Deferred outflows of resources	195 092	98 735	195 092	98 735
Total assets and deferred outflows of resources	<u>9 561 286</u>	<u>7 454 392</u>	<u>9 561 286</u>	<u>7 454 392</u>
Long-term liabilities outstanding	796 427	796 785	796 427	796 785
Other liabilities	111 429	486 463	111 429	486 463
Deferred inflows of resources	1 135	1 044	1 135	1 044
Total liabilities and deferred inflows of resources	<u>908 991</u>	<u>1 284 292</u>	<u>908 991</u>	<u>1 284 292</u>
Net Position:				
Net investment in capital assets	4 173 841	3 191 169	4 173 841	3 191 169
Restricted	493 678	925 409	469 173	925 409
Unrestricted	<u>3 984 776</u>	<u>2 053 522</u>	<u>4 009 281</u>	<u>2 053 522</u>
Total net position	<u>\$ 8 652 295</u>	<u>\$ 6 170 100</u>	<u>\$ 8 652 295</u>	<u>\$ 6 170 100</u>

As noted earlier, net position may serve over time as one useful indicator of a government’s financial condition. The assets and deferred outflows of the Town of Archer Lodge exceeded liabilities and deferred inflows by \$8,652,295 as of June 30, 2024. The Town’s net position increased by \$2,482,195 for the fiscal year ended June 30, 2024. A balance of \$4,173,841 represents the Town’s net investment in capital assets (e.g., land, buildings, machinery, and equipment). The Town of Archer Lodge uses these capital assets to provide services to citizens; consequently, these assets are not available for future spending. Although the Town of Archer Lodge’s net investment in capital assets is reported net of the outstanding related debt, the resources needed to repay that debt must be provided by other sources, since the capital assets cannot be used to liquidate these liabilities. The remaining balance of the Town of Archer Lodge’s net position \$493,678 (5.7%) represents resources that are subject to external restrictions on how they may be used.

Several aspects of the Town’s financial operations positively influenced the total unrestricted governmental net position:

- Continued diligence in the collection of property taxes by maintaining a tax collection percentage of 99.94%, which is somewhat better than municipalities of similar size in North Carolina (98.56%).
- Spending levels being significantly lower than budgeted amounts.

Town of Archer Lodge’s Changes in Net Position

Figure 3

	<u>Governmental Activities</u> <u>2024</u>	<u>Governmental Activities</u> <u>2023</u>	<u>Total</u> <u>2024</u>	<u>Total</u> <u>2023</u>
Revenues:				
Program revenues				
Charges for services	\$ 86 423	\$ 7 655	\$ 86 423	\$ 7 655
Operating grants and contributions	51 613	51 282	51 613	51 282
Capital grants and contributions	2 681 933	779 053	2 681 933	779 053
General Revenues				
Property taxes	1 307 061	1 133 793	1 307 061	1 133 793
Other taxes	624 819	522 710	624 819	522 710
Investment earnings	138 539	96 854	138 539	96 854
Other	5 446	4 351	5 446	4 351
Total revenues	<u>4 895 834</u>	<u>2 595 698</u>	<u>4 895 834</u>	<u>2 595 698</u>
Expenses:				
General government	1 116 671	600 309	1 116 671	600 309
Public safety	518 505	375 857	518 505	375 857
Transportation	19 798	22 624	19 798	22 624
Economic and physical development	180 969	157 275	180 969	157 275
Cultural and recreation	554 503	452 948	554 503	452 948
Interest on long-term debt	23 193	26 600	23 193	26 600
Total expenses	<u>2 413 639</u>	<u>1 635 613</u>	<u>2 413 639</u>	<u>1 635 613</u>
Increase in net position	2 482 195	960 085	2 482 195	960 085
Net position beginning	6 170 100	5 210 015	6 170 100	5 210 015
Net position, June 30	<u>\$ 8 652 295</u>	<u>\$ 6 170 100</u>	<u>\$ 8 652 295</u>	<u>\$ 6 170 100</u>

The Town’s overall net position increased \$2,482,195 from the prior year. The reasons for this increase as discussed in the following section.

Governmental activities: Governmental activities increased the Town’s net position by \$2,482,195 thereby accounting for all the total growth in the net position of the Town of Archer Lodge.

Certain Key elements for the governmental funds:

- Total revenues, excluding the one-time Regional Economic Development Research grant of \$2,365,000, were 4.9% higher than operating expenses incurred by the Town.
- Property tax revenue increased 15% with 12% attributable to the 3-cent ad valorem tax rate increase for fire services and 3% to growth in the property values.

- The Town receives 26% of their operating budget from state-shared revenues including but not limited to utility franchise taxes and sales taxes.
- The Town continued to receive PEG channel support from the NC Department of Revenue and contribution to East Wake Television (PEG Media Partners) of \$51,613.
- The Town received \$2,365,000 from the Regional Economic Development Research program for parks capital projects with only \$4,910 spent during FY2024, thereby increasing the cash accounts.

Financial Analysis of the Town's Funds

As noted earlier, the Town of Archer Lodge uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements.

Governmental Funds. The focus of the Town of Archer Lodge's governmental funds is to provide information on near-term inflows, outflows, and balances of usable resources. Such information is useful in assessing the Town of Archer Lodge's financing requirements.

The General Fund is the chief operating fund of the Town of Archer Lodge. At the end of the current fiscal year, Town of Archer Lodge's fund balance available in the General Fund was \$1,019,600 while total fund balance in the General Fund was \$1,290,913. The Town currently has an available fund balance of 36.7% of general fund expenditures, while total fund balance represents 46.5% of that same amount.

At June 30, 2024, the governmental funds of Town of Archer Lodge reported a combined fund balance of \$4,522,431 with a net increase in fund balance of \$1,525,168. The increase is due mainly to the Town receiving the \$2.3 million REDR grant. The General Fund actually decreased by \$484,646 due to using general funds for the park capital project and operating expenses.

General Fund Budgetary Highlights. During the fiscal year, the Town revised the budget on several occasions. Generally, budget amendments fall into one of three categories: 1) amendments made to adjust the estimates that are used to prepare the original budget ordinance once exact information is available; 2) amendments made to recognize new funding amounts from external sources, such as Federal and State grants; and 3) increases in appropriations that become necessary to maintain services.

Total revenue exceeded budgeted revenue primarily because of state shared revenues and property tax revenues came in higher than expected. The Town took continued steps to keep expenditures low in order to build the amount of unreserved fund balance. Also, the Town hired a full-time town planner and a park maintenance technician, which increased payroll expenses. The Town continued receiving police protection services from Johnston County at no cost to the Town for the current year.

Capital Asset and Debt Administration

Capital Assets. The Town of Archer Lodge's investment in capital assets for its governmental activities as of June 30, 2024, totals \$4,732,387 (net of accumulated depreciation). These assets include land, buildings, equipment, and IT subscriptions.

Major capital asset transactions during the year which ended June 30, 2024, included parks construction of \$1,567,704.

**Town of Archer Lodge's Capital Assets
(Net of Depreciation)
Figure 4**

	<u>Governmental Activities</u>		<u>Total</u>	
	<u>2024</u>	<u>2023</u>	<u>2024</u>	<u>2023</u>
Land	\$ 804 123	\$ 804 123	\$ 804 123	\$ 804 123
Construction in progress	598 333	2 302 739	598 333	2 302 739
Buildings	579 586	607 162	579 586	607 162
Equipment	81 953	-	81 953	-
Vehicles	51 140	69 457	51 140	69 457
Infrastructure	2 582 471	41 832	2 582 471	41 832
IT subscriptions	34 781	47 592	34 781	47 592
Total capital assets	<u>\$ 4 732 387</u>	<u>\$ 3 872 905</u>	<u>\$ 4 732 387</u>	<u>\$ 3 872 905</u>

Additional information on the Town's capital assets can be found in Note III.A.5 of the Basic Financial Statements.

Long-term Debt. As of June 30, 2024, the Town of Archer Lodge had a total installment debt outstanding of \$520,000. The full amount of the debt is backed by the full faith and credit of the Town.

Town of Archer Lodge's Outstanding Debt

Figure 5

	<u>Governmental Activities</u>		<u>Total</u>	
	<u>2024</u>	<u>2023</u>	<u>2024</u>	<u>2023</u>
Installment Purchases	\$ 520 000	\$ 630 334	\$ 520 000	\$ 630 334
IT Subscription Liabilities	38 545	51 403	38 545	51 403
Net Pension Liability (LGERS)	197 302	90 263	197 302	90 263
Compensated Absences	40 580	24 785	40 580	24 785
Total	<u>\$ 796 427</u>	<u>\$ 796 785</u>	<u>\$ 796 427</u>	<u>\$ 796 785</u>

Town of Archer Lodge's Outstanding Debt. The Town of Archer Lodge's total installment debt decreased by \$110,334 during the past fiscal year. During the fiscal year, principal payments of \$33,334 were made for the original Town Hall building, \$50,000 on the park land, and \$27,000 for the Town Hall expansion installment purchase obligations. North Carolina general statutes limit the amount of general obligation debt that a unit of government can issue to 8 percent of the total assessed value of taxable property located within that government's boundaries. The legal debt margin for the Town of Archer Lodge is \$34,340,000.

The Town's IT subscription liabilities for governmental activities decreased by \$12,858.

Additional information regarding the Town of Archer Lodge's long-term debt can be found in Note III.B.5 of the Basic Financial Statements.

Economic Factors and Next Year's Budgets and Rates

The following key economic indicators reflect the growth and prosperity of the Town.

- Population estimates made by the NC Department of Budget and Management indicate that as of July 2023, the Town population increased to 5,164, an increase of 7.7% over the 2020 Census count of 4,797. No new population estimates have been updated since that time.
- State shared revenues, including sales tax, increased over the prior year due to economic growth in Johnston County and in North Carolina.
- The unemployment rate for Johnston County in June 2024 was 3.7% as compared to 3.7% for the State of North Carolina, an increase for both data units from 2023.

Budget Highlights for the Fiscal Year Ending June 30, 2025

Governmental Activities: The ad valorem tax rate was set at \$0.32 per \$100 valuation, an increase of \$0.02. The distribution of the property tax was approved as \$0.14 (increase of \$0.02) for the North Side Fire District, \$0.02 for the park reserve fund, and \$0.16 for the General Operating Fund. The total expected property tax revenue is \$1,328,000 an increase of \$21,000 over the previous year.

Some of the main expenditures in the 2024-2025 Budget include:

- Forty-five percent of the property tax revenue funds the Archer Lodge Fire Department estimated at \$596,000 (or 20.6% of the total budget).
- Debt service payments of \$140,125 for the town hall, town hall expansion, and park loans.
- PEG channel support from the NC Department of Revenue and contribution to East Wake Television (PEG Media Partners) \$60,000.
- Funding for up to 5.0% merit increases.
- Appropriation of \$378,000 of fund balance for purchase of a Ford F-150 (\$45,000) and for general operating expenses.
- Funding to contract with the Johnston County Sheriff Office for direct law enforcement coverage dedicated to the Town of Archer Lodge under a 7-day 12-hour per day assignment in the amount of \$250,000.

Requests for Information

This report is designed to provide an overview of the Town's finances for those with an interest in this area. Questions concerning any of the information found in this report or requests for additional information should be directed to the Finance Officer, Town of Archer Lodge, 14094 Buffalo Road, Archer Lodge, N.C. 27527. Other forms of contact include calling (919)359.9727, visiting the Town's website at www.archerlodgenc.gov, or through email to kim.batten@archerlodgenc.gov for additional information.

BASIC FINANCIAL STATEMENTS

Town of Archer Lodge, North Carolina
Statement of Net Position
June 30, 2024

	Primary Government	
	Governmental Activities	Total
ASSETS		
Current assets:		
Cash and cash equivalents	\$ 4 219 500	\$ 4 219 500
Taxes receivables (net)	1 568	1 568
Accrued interest receivable	216	216
Due from other governments	158 259	158 259
Restricted cash & cash equivalents	254 265	254 265
Total current assets	<u>4 633 808</u>	<u>4 633 808</u>
Non-current assets:		
Capital assets:		
Land, non-depreciable improvements, and construction in progress	1 402 456	1 402 456
Other capital assets, net of depreciation	3 295 149	3 295 149
Right to use assets, net of amortization	34 781	34 781
Total capital assets	<u>4 732 386</u>	<u>4 732 386</u>
Total assets	<u>9 366 194</u>	<u>9 366 194</u>
DEFERRED OUTFLOWS OF RESOURCES		
Pension deferrals	195 092	195 092
Total deferred outflows of resources	<u>195 092</u>	<u>195 092</u>
LIABILITIES		
Current liabilities:		
Accounts payable	108 711	108 711
Payables from restricted assets	220	220
Accrued interest payable	2 498	2 498
Current portion of long-term liabilities	121 236	121 236
Total current liabilities	<u>232 665</u>	<u>232 665</u>
Long-term liabilities:		
Net pension liability	197 302	197 302
Compensated absences	40 580	40 580
Due in more than one year	437 309	437 309
Total liabilities	<u>907 856</u>	<u>907 856</u>
DEFERRED INFLOWS OF RESOURCES		
Prepaid taxes	662	662
Pension deferrals	473	473
Total deferred inflows of resources	<u>1 135</u>	<u>1 135</u>
NET POSITION		
Net investment in capital assets	4 173 841	4 173 841
Restricted for:		
Stabilization by State Statute	214 908	214 908
Capital projects	278 770	2 671 802
Unrestricted	3 984 776	1 591 744
Total net position	<u>\$ 8 652 295</u>	<u>\$ 8 652 295</u>

The notes to the financial statements are an integral part of this statement.

**Town of Archer Lodge, North Carolina
Statement of Activities
For the Year Ended June 30, 2024**

Functions/Programs	Program Revenues				Net (Expense) Revenue and Changes in Net Position	
	Expenses	Charges For Services	Operating Grants And Contributions	Capital Grants And Contributions	Governmental Activities	Total
Primary government:						
Governmental Activities:						
General government	\$ 1 116 671	\$ -	\$ 51 613	\$ 855	\$ (1 064 203)	\$ (1 064 203)
Public safety	518 505	305	-	-	(518 200)	(518 200)
Transportation	19 798	-	-	-	(19 798)	(19 798)
Economic & physical development	180 969	11 465	-	-	(169 504)	(169 504)
Cultural and recreation	554 503	74 653	-	2 681 078	2 201 228	2 201 228
Interest on long-term debt	23 193	-	-	-	(23 193)	(23 193)
Total governmental activities	<u>2 413 639</u>	<u>86 423</u>	<u>51 613</u>	<u>2 681 933</u>	<u>406 330</u>	<u>406 330</u>
Total primary government	<u>\$ 2 413 639</u>	<u>\$ 86 423</u>	<u>\$ 51 613</u>	<u>\$ 2 681 933</u>	<u>406 330</u>	<u>406 330</u>
General revenues						
Taxes:						
Property taxes levied for general purpose					1 307 061	1 307 061
Other taxes					624 819	624 819
Unrestricted investment earnings					138 539	138 539
Miscellaneous					5 446	5 446
Total general revenues					<u>2 075 865</u>	<u>2 075 865</u>
Change in net position					2 482 195	2 482 195
Net position, beginning					6 170 100	6 170 100
Net position, ending					<u>\$ 8 652 295</u>	<u>\$ 8 652 295</u>

The notes to the financial statements are an integral part of this statement.

**Town of Archer Lodge, North Carolina
Balance Sheet
Governmental Funds
For the Year Ended June 30, 2024**

	General Fund	Regional Economic Development Reserve Grant Capital Fund	Total Non-Major Funds	Total Governmental Funds
ASSETS				
Cash and cash equivalents	\$ 1 242 027	\$ 2 393 033	\$ 584 440	\$ 4 219 500
Restricted cash	-	-	254 265	254 265
Receivables, net:				
Taxes	1 568	-	-	1 568
Due from other governments	158 259	-	-	158 259
Total assets	<u>1 401 854</u>	<u>2 393 033</u>	<u>838 705</u>	<u>4 633 592</u>
LIABILITIES				
Accounts payable and accrued liabilities	108 711	220	-	108 931
Total liabilities	<u>108 711</u>	<u>220</u>	<u>-</u>	<u>108 931</u>
DEFERRED INFLOWS OF RESOURCES				
Property taxes receivable	1 568	-	-	1 568
Prepaid taxes	662	-	-	662
Total deferred inflows of resources	<u>2 230</u>	<u>-</u>	<u>-</u>	<u>2 230</u>
FUND BALANCES				
Restricted				
Stabilization by State Statute	214 908	-	-	214 908
Capital projects	-	-	254 265	254 265
Assigned				
Future capital projects	-	2 366 583	118 339	2 484 922
Public safety	-	-	441 596	441 596
Subsequent year's expenditures	56 405	26 230	24 505	107 140
Unassigned	1 019 600	-	-	1 019 600
Total fund balances	<u>1 290 913</u>	<u>2 392 813</u>	<u>838 705</u>	<u>4 522 431</u>
Total liabilities, deferred inflows of resources and fund balances	<u>\$ 1 401 854</u>	<u>\$ 2 393 033</u>	<u>\$ 838 705</u>	<u>\$ 4 633 592</u>

**Town of Archer Lodge
Reconciliation of Balance Sheet to the Statement of Net Position
Governmental Funds
For the Year Ended June 30, 2024**

Amounts reported for governmental activities in the Statement of Net Position (Exhibit 1) are different because:		
Total Fund Balance, Governmental Funds	\$	4 522 431
Capital assets used in governmental activities are not financial resources and therefore, are not reported in the funds.		
Gross capital assets at historical cost	5 187 634	
Accumulated depreciation	<u>(490 029)</u>	4 697 605
Right to use assets used in governmental activities are not financial resources and therefore, not reported in the funds		
Accumulated amortization	60 403	
	<u>(25 622)</u>	34 781
Deferred outflows of resources related to pensions are not reported in the funds		
		195 092
Other long-term assets (accrued interest receivable from taxes) are not available to pay for current-period expenditures and therefore are inflows of resources in the funds.		
		216
Earned revenues considered deferred inflows of resources in fund statements.		
		1 053
Long-term liabilities used in governmental activities are not financial uses and therefore, are not reported in the funds		
Gross long-term debt beginning	(681 736)	
Long-term debt included as net position below (includes the addition of long-term debt and principal payments during the year.)	<u>123 191</u>	(558 545)
Net pension liability		(197 302)
Deferred inflows of resources related to pensions are not reported in the funds		
		(473)
Other long-term liabilities (accrued interest) are not due and payable in the current period and therefore are not reported in the funds		
Compensated absences		<u>(1 983)</u>
		(40 580)
Net position of governmental activities	\$	<u><u>8 652 295</u></u>

The notes to the financial statements are an integral part of this statement.

Town of Archer Lodge, North Carolina
Statement of Revenues, Expenditures, and Changes in Fund Balances
Governmental Funds
For the Year Ended June 30, 2024

	General Fund	Regional Economic Development Reserve Grant Capital Fund	Total Non-Major Funds	Total Governmental Funds
REVENUES				
Ad valorem taxes	\$ 1 306 137	\$ -	\$ -	\$ 1 306 137
Unrestricted intergovernmental	624 819	-	-	624 819
Restricted intergovernmental	2 464 113	-	262 578	2 726 691
Sales and services	11 770	-	-	11 770
Permits and fees	74 653	-	-	74 653
Investment earnings	68 129	32 723	37 687	138 539
Miscellaneous	12 301	-	-	12 301
Total revenues	4 561 922	32 723	300 265	4 894 910
EXPENDITURES				
Current:				
General government	1 016 793	-	-	1 016 793
Public Safety	518 505	-	-	518 505
Transportation	19 799	-	-	19 799
Economic and physical development	191 833	-	-	191 833
Culture and recreation	884 631	-	-	884 631
Debt service:				
Principal	123 191	-	-	123 191
Interest and other charges	23 193	-	-	23 193
Capital outlay	-	4 910	586 887	591 797
Total expenditures	2 777 945	4 910	586 887	3 369 742
Excess (deficiency) of revenues over expenditures	1 783 977	27 813	(286 622)	1 525 168
OTHER FINANCING SOURCES (USES)				
Transfer from other funds	183 000	2 365 000	86 623	2 634 623
Transfer to other funds	(2 451 623)	-	(183 000)	(2 634 623)
Total other financing sources(uses)	(2 268 623)	2 365 000	(96 377)	-
Net change in fund balance	(484 646)	2 392 813	(382 999)	1 525 168
Fund balances, beginning	1 775 559	-	1 221 704	2 997 263
Fund balances, ending	\$ 1 290 913	\$ 2 392 813	\$ 838 705	\$ 4 522 431

The notes to the financial statements are an integral part of this statement.

Town of Archer Lodge, North Carolina
Reconciliation of the Statement of Revenues, Expenditures, and Changes in Fund Balance
Of Governmental Funds to the Statement of Activities
For the Year Ended June 30, 2024

Net changes in fund balances – total governmental funds	\$	1 525 168
<p>Governmental funds report capital outlays as expenditures. However, in the Statement of Activities the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which capital outlays exceeded depreciation in the current period.</p>		
Capital outlay expenditures which were capitalized	\$ 1 023 435	
Depreciation expense for governmental assets	<u>(151 143)</u>	872 292
Right to use IT subscription agreement	-	
Amortization expense for intangible assets	<u>(12 811)</u>	(12 811)
Contributions to the pension plan in the current fiscal year are not included on the Statement of Activities		65 705
Revenues in the statement of activities that do not provide current financial resources are not reported as revenues in the funds		
Change in unavailable revenue for tax revenues		925
<p>The issuance of long-term debt provides current financial resources to governmental funds, while the repayment of the principal of long-term debt consumes the current financial resources of governmental funds. Neither transaction has any effect on net position. This amount is the net effect of these differences in the treatment of long-term debt and related items.</p>		
New long-term debt issued		
IT agreement payments	12 857	
Principal payments on long-term debt	<u>110 333</u>	123 190
<p>Some expenses reported in the statement of activities do not require the use of current financial resources and, therefore, are not reported as expenditures in governmental funds.</p>		
Compensated absences	(15 795)	
Pension expense	<u>(76 479)</u>	<u>(92 274)</u>
Total changes in net position of governmental activities	\$	<u><u>2 482 195</u></u>

The notes to the financial statements are an integral part of this statement.

Town of Archer Lodge, North Carolina
General Fund and Annually Budgeted Major Project Fund
Statement of Revenues, Expenditures, and Changes in Fund Balance – Budget and Actual
For the Year Ended June 30, 2024

	General Fund			Variance with Final Budget- Positive (Negative)
	Original	Final	Actual Amounts	
Revenues:				
Ad valorem taxes	\$ 1 140 500	\$ 1 292 500	\$ 1 306 137	\$ 13 637
Unrestricted intergovernmental	485 500	565 000	624 819	59 819
Restricted intergovernmental	51 500	2 464 000	2 464 113	113
Sales and services	5 000	84 000	11 770	(72 230)
Permits and fees	139 000	74 000	74 653	653
Investment earnings	25 000	70 000	68 129	(1 871)
Miscellaneous	3 000	14 000	12 301	(1 699)
Total revenues	<u>1 849 500</u>	<u>4 563 500</u>	<u>4 561 922</u>	<u>(1 578)</u>
Expenditures:				
Current:				
General government	639 065	1 132 254	1 016 793	115 461
Public safety	682 000	712 000	518 505	193 495
Transportation	27 000	27 000	19 799	7 201
Economic & physical development	231 600	253 100	191 833	61 267
Cultural and recreation	900 782	982 247	884 631	97 616
Debt service:				
Principal retirement	110 336	110 336	123 191	(12 855)
Interest and other charges	22 560	22 560	23 193	(633)
Total expenditures	<u>2 613 343</u>	<u>3 239 497</u>	<u>2 777 945</u>	<u>461 552</u>
Revenues over (under) expenditures	<u>(763 843)</u>	<u>1 324 003</u>	<u>1 783 977</u>	<u>459 974</u>
Other financing sources (uses):				
Transfers from other funds	258 000	383 000	183 000	(200 000)
Transfers to other funds	(162 000)	(2 527 000)	(2 451 623)	75 377
Total other financing sources (uses)	<u>96 000</u>	<u>(2 144 000)</u>	<u>(2 268 623)</u>	<u>(124 623)</u>
Fund balance appropriated	347 846	500 000	-	(500 000)
Net change in fund balance	\$ <u>(319 997)</u>	\$ <u>(319 997)</u>	(484 646)	\$ <u>(164 649)</u>
Fund balances, beginning			<u>1 775 559</u>	
Fund balances, ending			\$ <u>1 290 913</u>	

The notes to the financial statements are an integral part of this statement.

Notes to the Financial Statements

**Town of Archer Lodge, North Carolina
Notes to the Financial Statements
For the Fiscal Year Ended June 30, 2024**

I. Summary of Significant Accounting Policies

The accounting policies of the Town of Archer Lodge conform to generally accepted accounting principles as applicable to governments. The following is a summary of the more significant accounting policies:

A. Reporting Entity

The Town of Archer Lodge is a municipal corporation that is governed by an elected mayor and a five-member council.

B. Basis of Presentation

Government-wide Statements: The statement of net position and the statement of activities display information about the primary government. These statements include the financial activities of the overall government. These statements distinguish between the *governmental* and *business-type activities* of the Town. Governmental activities generally are financed through taxes, intergovernmental revenues, and other non-exchange transactions. Business-type activities are financed in whole or in part by fees charged to external parties. The Town of Archer Lodge does not perform any business-type activities at this time.

The statement of activities presents a comparison between direct expenses and program revenues for each function of the Town's governmental activities. Direct expenses are those that are specifically associated with a program or function and, therefore, are clearly identifiable to a particular function. Indirect expense allocations that have been made in the funds have been reversed for the statement of activities. Program revenues include (a) fees and charges paid by the recipients of goods or services offered by the programs and (b) grants and contributions that are restricted to meeting the operational or capital requirements of a particular program. Revenues that are not classified as program revenues, including all taxes, are presented as general revenues.

Fund Financial Statements: The fund financial statements provide information about the Town's funds. The Town has no proprietary nor fiduciary funds to report. The emphasis of fund financial statements is on major governmental funds, each displayed in a separate column. All remaining governmental are aggregated and reported as non-major funds.

The Town reports the following major governmental funds:

General Fund. The General Fund is the general operating fund of the Town. The General Fund accounts for all financial resources except those that are required to be accounted for in another fund. The primary revenue sources are ad valorem taxes and franchise taxes. The primary expenditures are for administration, public safety, and cultural/recreational services.

Regional Economic Development Reserve Grant Fund. This fund is used to account for transactions related to state grant funds for parks.

The Town reports the following non-major governmental funds:

Capital Reserve Fund. This fund is used to account for future capital projects.

Public Safety Reserve Fund. This fund is used to account for future public safety projects.

Capital Town Park Project Fund. This fund is used to account for the building of a new town park and its amenities.

American Rescue Plan Fund. This fund accounts for the transactions related to the American Rescue Plan Act funds.

State Capital & Infrastructure Fund. This fund accounts for the transactions related to state grant funds for parks.

Park Reserve Fund. This fund is used to account for future park projects.

C. Measurement Focus and Basis of Accounting

In accordance with North Carolina General Statutes, all funds of the Town are maintained during the year using the modified accrual basis of accounting.

Government-wide Financial Statements. The government-wide financial statements are reported using the economic resources measurement focus. The government-wide financial statements are reported using the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded at the time liabilities are incurred, regardless of when the related cash flows take place. Non-exchange transactions, in which the Town gives (or receives) value without directly receiving (or giving) equal value in exchange, include property taxes, grants, and donations. On an accrual basis, revenue from property taxes is recognized in the fiscal year for which the taxes are levied. Revenue from grants and donations is recognized in the fiscal year in which all eligibility requirements have been satisfied.

Amounts reported as program revenues include 1) charges to customers or applicants for goods, services, or privileges provided, 2) operating grants and contributions, and 3) capital grants and contributions, including special assessments. Internally dedicated resources are reported as general revenues rather than as program revenues. Likewise, general revenues include all taxes.

Governmental Fund Financial Statements. Governmental funds are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Under this method, revenues are recognized when measurable and available. Expenditures are recorded when the related fund liability is incurred, except for principal and interest on general long-term debt, claims and judgments, and compensated absences, which are recognized as expenditures to the extent they have matured. General capital asset acquisitions are reported as expenditures in governmental funds. General capital acquisitions are reported as expenditures in governmental funds. Issuance of general long-term debt and acquisitions under leases and IT subscriptions are reported as other financing sources.

The Town considers all revenues available if they are collected within 90 days after year-end, except for property taxes. Ad valorem tax receivables are not accrued as revenue because the amount is not susceptible to accrual. At June 30, taxes receivable for property other than motor vehicles are materially past due and are not considered to be an available resource to finance the operations of the current year. Also, as of September 1, 2013, State law altered the procedures for the assessment and collection of property taxes on registered motor vehicles in North Carolina. Effective with this change in the law, the State of North Carolina is responsible for billing and collecting the property taxes on registered motor vehicles on behalf of all municipalities and special tax districts. Property taxes are due when vehicles are registered. The billed taxes are applicable to the fiscal year in which they are

received. Uncollected taxes that were billed in periods prior to September 1, 2013, and for limited registration plates are shown as a receivable in these financial statements and are offset by deferred inflows of resources.

Sales taxes and certain intergovernmental revenues, such as the utilities franchise tax, collected and held by the State at year-end on behalf of the Town are recognized as revenue. Sales taxes are considered a shared revenue for the Town of Archer Lodge because the tax is levied by Johnston County and then remitted to and distributed by the State. Most intergovernmental revenues and sales and services are not susceptible to accrual because generally they are not measurable until received in cash. All taxes are reported as general revenues rather than program revenues. Under the terms of grant agreements, the Town funds certain programs by a combination of specific cost-reimbursement grants, categorical block grants, and general revenues. It is the Town's policy to first apply cost-reimbursement grant resources to such programs, followed by categorical block grants, and then by general revenues.

D. Budgetary Data

The Town's budgets are adopted as required by the North Carolina General Statutes. An annual budget is adopted for the General Fund. All annual appropriations lapse at the fiscal-year end. Ordinances have been adopted for the Capital Reserve Fund, Park Reserve Fund, Public Safety Reserve Fund, and Economic Development Research Grant Capital Fund. All budgets are prepared using the modified accrual basis of accounting. Expenditures may not legally exceed appropriations at the departmental level for all annually budgeted funds and at the project level for the multi-year funds. The Town Council must approve all budget amendments. The budget ordinance must be adopted by July 1 of the fiscal year, or the Town Council must adopt an interim budget that covers that time until the annual ordinance can be adopted.

E. Assets, Liabilities, Deferred Outflows/Inflows of Resources and Fund Equity

1. Deposits and Investments

All deposits of the Town are made in board-designated official depositories and are secured as required by State law [G.S. 159-31]. The Town may designate, as an official depository, any bank or savings association whose principal office is located in North Carolina. Also, the Town may establish time deposit accounts such as NOW and SuperNOW accounts, money market accounts, and certificates of deposit.

NC State law [G.S.159-30(c)] authorizes the Town to invest in obligations of the United States or obligations fully guaranteed both as to principal and interest by the United States; obligations of the State of North Carolina; bonds and notes of any North Carolina local government or public authority; obligations of certain non-guaranteed federal agencies; certain high-quality issues of commercial paper and bankers' acceptances, and mutual fund shares when the mutual fund is certified by the Local Government Commission. The Town's investments are generally reported at fair value.

The North Carolina Capital Management Trust (NCCMT) Government Portfolio is a SEC-registered money market mutual fund that is currently certified by the Local Government Commission under the provisions of G.S. 159-30(c)(8) and the North Carolina Administrative Code. The Government Portfolio is a 2a7 fund that invests in treasuries, government agencies, and repurchase agreements collateralized by treasuries. It is rated AAAM by S&P and AAA-mf by Moody's Investor Services and reported at fair value.

2. Cash and Cash Equivalents

The Town pools money from several funds to facilitate disbursement and investment and to maximize investment income. Therefore, all cash and investments are essentially demand deposits and are considered cash and cash equivalents.

3. Restricted Assets

The unexpended grant proceeds from the NC Parks and Recreation Trust fund, American Rescue Plan fund, and State Capital Infrastructure fund are classified as restricted assets for the park's expansion project.

Town of Archer Lodge Restricted Cash

Governmental Activities:

State Capital & Infrastructure- Parks	\$	251 000
American Rescue Plan		209
Capital Town Park Project Fund		<u>2 966</u>
Total Restricted Cash	\$	<u><u>254 265</u></u>

4. Ad Valorem Taxes Receivable

In accordance with State law [G.S. 105-347 and G.S. 159-13(a)], the Town levies ad valorem taxes on property other than motor vehicles on July 1, the beginning of the fiscal year. The taxes are due on September 1 (lien date); however, interest does not accrue until the following January 6th. These taxes are based on the assessed values as of January 1, 2023.

5. Allowances for Doubtful Accounts

All receivables that historically experience uncollectible accounts are shown net of an allowance for doubtful accounts. This amount is estimated by analyzing the percentage of receivables that were written off in prior years.

6. Lease Receivable

The town's lease receivable is measured at the present value of lease payments expected to be received during the lease term. Under the lease agreement, the Town may receive variable lease payments that are dependent upon the lessee's revenue. The variable payments are recorded as an inflow of resources in the period the payment is received.

A deferred inflow of resources is recorded for the lease. The deferred inflow of resources is recorded at the initiation of the lease in an amount equal to the initial recording of the lease receivable. The deferred inflow of resources is amortized on a straight-line basis over the term of the lease.

7. Prepaid Items

Certain payments to vendors may reflect costs applicable to future accounting periods and are recorded as prepaid items in both government-wide and fund financial statements and expensed as the items are used.

8. Capital Assets

Capital assets are defined by the government as assets with an initial, individual cost of more than a certain cost and an estimated useful life in excess of two years. Minimum capitalization costs are as follows: land, \$10,000; buildings, improvements, \$5,000; infrastructure, \$20,000; furniture and equipment, \$5,000; vehicles and motorized equipment, \$5,000; and computer software and computer equipment \$5,000. Donated capital assets received prior to June 15, 2015, are recorded at their estimated fair value at the date of donation. Donated capital assets received after June 15, 2015, are recorded at acquisition value. All other purchased or constructed capital assets are reported at cost or estimated historical cost. The cost of normal maintenance and repairs that do not add to the value of the asset or materially extend assets' lives are not capitalized.

The Town's capital assets also include certain right to use assets. These right to use assets arise in association with agreements where the Town reports an Information Technology (IT) Subscription in accordance with the requirements of GASB 96.

The right to use IT subscription assets are initially measured at an amount equal to the initial measurement of the subscription liability plus any subscription payments made at the start of the subscription term, if applicable, plus capitalizable initial implementation costs at the start of the subscription term less any incentives received from the IT subscription vendor at the start of the subscription term. Subscription payments, as well as payments for capitalizable implementation costs made before the start of the subscription term are reported as prepayment (asset). Such prepayments are reduced by any incentives received from the same vendor before the start of the subscription term if a right of offset exists. The net amount of the prepayments and incentives are reported as an asset or liability, as appropriate, before the start of the subscription term at which time the amount is included in the initial measurement of the subscription asset. The right to use subscription assets are amortized on a straight-line basis over the subscription term.

Capital assets are depreciated using the straight-line method over the following estimated useful lives:

<u>Asset Class</u>	<u>Estimated Useful Lives</u>
Infrastructure	50
Buildings	30
Improvements	25
Vehicles and motorized equipment	5
Furniture and equipment	5-10
Computer Equipment	3
Computer Software	5

Should the Town have leases, it would record right to use lease assets as a result of implementing GASB 87. The right to use assets are initially measured an amount equal to the initial measurement of the related lease liability plus any lease payments made prior to the lease term, less lease incentives, and plus ancillary charges necessary to place the lease into service. The right to use assets are amortized on a straight-line basis over the life of the related lease.

9. Deferred outflows/inflows of resources

In addition to assets, the statement of financial position will sometimes report a separate section for deferred outflows of resources. This separate financial statement element, *Deferred Outflows of Resources*, represents a

consumption of net position that applies to a future period and so will not be recognized as an expense or expenditure until then. The Town has one item that meets this criterion, pension deferrals for the 2024 fiscal year. In addition to liabilities, the statement of financial position will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, *Deferred Inflows of Resources*, represents an acquisition of net position that applies to a future period and so will not be recognized as revenue until then. The Town has several items that meet the criterion for this category, prepaid taxes, property taxes receivable, unavailable revenues (reported only on the Balance Sheet of the Governmental Funds), and pension deferrals.

10. Long-Term Obligations

In the government-wide financial statements, long-term debt and other long-term obligations are reported as liabilities in the applicable governmental activities statement of net position. Bond premiums and discounts are deferred and amortized over the life of the bonds using the straight-line method that approximates the effective interest method. Bonds payable are reported net of the applicable bond premiums or discount. Bond issuance costs, except for prepaid insurance cost, are expensed in the reporting period in which they are incurred. Prepaid insurance costs are expensed over the life of the debt.

In fund financial statements, governmental fund types recognize bond premiums and discounts, as well as bond issuance costs, during the current period. The face amount of debt issued is reported as other financing sources. Premiums received on debt issuances are reported as other financing sources while discounts on debt issuances are reported as other financing uses. Issuance costs, whether or not withheld from the actual debt proceeds received, are reported as debt service expenditures.

11. Compensated Absences

The vacation policy of the Town provides for the accumulation of up to thirty days' earned vacation leave with such leave being fully vested when earned. For the Town's government-wide fund, an expense and a liability for compensated absences and the salary-related payments are recorded as the leave is earned. The Town has assumed a first-in, first-out method of using accumulated compensated time. The portion of that time that is estimated to be used in the next fiscal year has been designated as a current liability in the government-wide financial statements.

The Town's sick leave policy provides for an unlimited accumulation of earned sick leave. Sick leave does not vest, but any unused sick leave accumulated at the time of retirement may be used in the determination of length of service for retirement benefit purposes. Since the Town does not have any obligation for the accumulated sick leave until it is taken, no accrual for sick leave has been made.

12. Net Position/Fund Balances

Net Position

Net Position in government-wide financial statements is classified as net investment in capital assets, restricted, and unrestricted. Restricted net position represents constraints on resources that are either externally imposed by creditors, grantors, contributors, or laws or regulations of other governments or imposed by law through state statute.

Fund Balances

In the governmental fund financial statements, fund balance is composed of five classifications designed to disclose the hierarchy of constraints placed on how fund balance can be spent.

The governmental fund types classify fund balances as follows:

Non-spendable Fund Balance – This classification includes amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.

Restricted Fund Balance – This classification includes amounts that are restricted to specific purposes externally imposed by creditors or imposed by law.

Restricted for Stabilization by State statute – North Carolina G.S. Chapter 159-8 prohibits units of government from budgeting or spending a portion of their fund balance. This is one of several statutes enacted by the North Carolina State Legislature in the 1930's that were designed to improve and maintain the fiscal health of local government units. Restricted by State statute (RSS) is calculated at the end of each fiscal year for all annually budgeted funds. The calculation in G.S. 159-8(a) provides a formula for determining what portion of fund balance is available for appropriation. The amount of fund balance not available for appropriation is what is known as "restricted by State statute." Appropriated fund balance in any fund shall not exceed the sum of cash and investments minus the sum of liabilities, encumbrances, and deferred revenues arising from cash receipts, as those figures stand at the close of the fiscal year next preceding the budget. Per GASB guidance, RSS is considered a resource upon which a restriction is "imposed by law through constitutional provisions or enabling legislation." RSS is reduced by inventories and prepaids as they are classified as non-spendable. Outstanding Encumbrances are included within RSS. RSS is included as a component of Restricted Net Position and Restricted Fund Balance on the face of the balance sheet.

Restricted for Parks Capital projects – portion of fund balance that is restricted by revenue source for parks projects.

Committed Fund Balance – portion of fund balance that can only be used for specific purposes imposed by majority vote by quorum of Town of Archer Lodge's governing body (highest level of decision-making authority). The governing body can, by adoption of an ordinance prior to the end of the fiscal year, commit fund balance. Once adopted, the limitation imposed by the ordinance remains in place until a similar action is taken (the adoption of another ordinance) to remove or revise the limitation.

Assigned Fund Balance - portion of fund balance that the Town of Archer Lodge intends to use for specific purposes.

Assigned for Capital Projects – portion of fund balance that has been budgeted by the Town Council for future capital projects.

Assigned for Public Safety – portion of fund balance that has been budgeted by the Town Council for the future development of a police force.

Assigned for Park Reserve – portion of fund balance that has been budgeted by the Town Council for the future development of parks.

Subsequent year's expenditures – portion of fund balance that is appropriated in the next year's budget that is not already classified in restricted or committed. The governing body approves the appropriation.

Unassigned fund balance – the portion of fund balance that has not been restricted, committed, or assigned to specific purposes or other funds.

The Town of Archer Lodge has a revenue spending policy that provides guidance for programs with multiple revenue sources. The Finance Officer will use resources in the following hierarchy: bond proceeds, federal funds, State funds, local non-town funds, town funds. For purposes of fund balance classification, expenditures are to be spent from restricted fund balance first, followed in-order by committed fund balance, assigned fund balance and, lastly, unassigned fund balance. The Finance Officer has the authority to deviate from this policy if it is in the best interest of the Town.

13. Defined Benefit Cost-Sharing Plan

For purposes of measuring the net pension asset, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Local Governmental Employees' Retirement system (LGERS) and additions to/deductions from LGERS' fiduciary net position have been determined on the same basis as they are reported by LGERS. For this purpose, plan member contributions are recognized in the period in which the contributions are due. The Town of Archer Lodge's employer contributions are recognized when due and the Town of Archer Lodge has a legal requirement to provide the contributions. Benefits and refunds are recognized when due and payable in accordance with the terms of LGERS. Investments are reported at fair value.

II. Stewardship, Compliance, and Accountability

A. Significant Violations of Finance-Related Legal and Contractual Provisions

None.

B. Deficit in Fund Balance or Net Position of Individual Funds

None.

C. Excess of Expenditures over Appropriations

None.

III. Detail Notes on All Funds

A. Assets

1. Deposits

All the deposits of the Town are either insured or collateralized by using one of two methods. Under the Dedicated Method, all deposits that exceed the federal depository insurance coverage level are collateralized with securities held by the Town's agents in these units' names. Under the Pooling Method, which is a collateral pool, all uninsured deposits are collateralized with securities held by the State Treasurer's agent in the name of the State Treasurer. Since the State Treasurer is acting in a fiduciary capacity for the Town these deposits are considered to be held by the Town's agents in their names. The amount of the pledged collateral is based on an approved averaging method for non-interest-bearing deposits and the actual current balance for interest-bearing deposits. Depositories using the Pooling Method report to the State Treasurer the adequacy of their pooled collateral covering uninsured deposits. The State Treasurer does not confirm this information with the Town, or the escrow agent. Because of the inability to measure the exact amounts of collateral pledged for the Town under the Pooling Method, the potential exists for under-collateralization. This risk may increase in periods of high cash flows. However, the State Treasurer of North

Carolina enforces strict standards of financial stability for each depository that collateralizes public deposits under the Pooling Method. The Town has no formal policy regarding custodial credit risk for deposits but relies on the State Treasurer to enforce standards of minimum capitalization for all pooling method financial institutions and to monitor them for compliance. The Town complies with the provisions of G.S. 159-31 when designating official depositories and verifying that deposits are properly secured.

At June 30, 2024, the Town's deposits had a carrying amount of \$522,361 and a bank balance of \$539,921. Of the bank balance, \$250,000 was covered by federal depository insurance and the remainder was covered by collateral held under the pooling method.

2. Investments

At June 30, 2024, the Town of Archer Lodge had \$3,951,405 invested with the North Carolina Capital Management Trust's Government Portfolio which carried a credit rating of AAAm by Standard and Poor's. The Town has no policy regarding credit risk.

3. Receivables – Allowances for Doubtful Accounts

All receivables that historically experience uncollectible accounts are shown net of an allowance for doubtful accounts. This amount is estimated by analyzing the percentage of receivables that were written off in prior years.

4. Leases Receivable

The Town has entered into no material leases under GASB 87.

5. Capital Assets

Primary Government

Capital asset activity for the Primary Government for the year ended June 30, 2024, were follows:

	<u>Beginning Balances</u>	<u>Increases</u>	<u>Decreases</u>	<u>Ending Balances</u>
Governmental activities:				
Capital assets not being depreciated:				
Land	\$ 804 123	\$ -	\$ -	\$ 804 123
Construction in Progress	2 302 739	-	1 704 406	598 333
Total capital assets not being depreciated	<u>3 106 862</u>	<u>-</u>	<u>1 704 406</u>	<u>1 402 456</u>
Capital assets being depreciated:				
Buildings and improvements	818 096	-	-	818 096
Equipment	89 902	95 610	-	185 512
Vehicles	91 585	-	-	91 585
Infrastructure	57 754	2 632 231	-	2 689 985
Total capital assets being depreciated	<u>1 057 337</u>	<u>2 727 841</u>	<u>-</u>	<u>3 785 178</u>
Less accumulated depreciation for:				
Buildings and improvements	210 933	27 577	-	238 510
Equipment	89 901	13 658	-	103 599
Vehicles	22 128	18 317	-	40 445
Infrastructure	15 923	91 591	-	107 514
Total accumulated depreciation	<u>338 885</u>	<u>151 143</u>	<u>-</u>	<u>490 028</u>
Total capital assets being depreciated, net	<u>718 452</u>	<u>2 576 698</u>	<u>-</u>	<u>3 295 150</u>
Capital assets being amortized:				
Right to use assets:				
IT subscriptions	60 403	-	-	60 403
Total capital assets being amortized	<u>60 403</u>	<u>-</u>	<u>-</u>	<u>60 403</u>
Less accumulated amortization for:				
Right to use assets:				
IT subscriptions	12 811	12 811	-	25 622
Total accumulated amortization	<u>12 811</u>	<u>12 811</u>	<u>-</u>	<u>25 622</u>
Total capital assets being amortized, net	<u>47 592</u>	<u>(12 811)</u>	<u>-</u>	<u>34 781</u>
Governmental activity capital assets, net	<u>\$ 3 872 906</u>	<u>\$ 2 563 887</u>	<u>\$ 1 704 406</u>	<u>\$ 4 732 387</u>

Depreciation and amortization expenses were charged to functions/programs of the primary government as follows:

General government	\$ 43 470
Culture and recreation	\$ 120 484
Total depreciation and amortization expense	<u>\$ 163 954</u>

Construction commitments

The government has active construction projects as of June 30, 2024. At year-end, the government's commitments with contractors are as follows:

<u>Project</u>	<u>Spent-to-date</u>	<u>Remaining Commitment</u>
Parks Construction	\$ 3 230 565	\$ 254 265

B. Liabilities

1. Pension Plan and Postemployment Obligations

a. Local Governmental Employee's Retirement System

Plan Description. The Town of Archer Lodge is a participating employer in the statewide Local Governmental Employees' Retirement System (LGERS), a cost-sharing multiple-employer defined benefit pension plan administered by the State of North Carolina. LGERS membership is comprised of general employees and local law enforcement officers (LEOs) of participating local governmental entities. Article 3 of G.S. Chapter 128 assigns the authority to establish and amend benefit provisions to the North Carolina General Assembly. Management of the plan is vested in the LGERS Board of Trustees, which consists of 13 members – nine appointed by the Governor, one appointed by the State Senate, one appointed by the State House of Representatives, and the State Treasurer and State Superintendent, who serve as ex-officio members. The Local Governmental Employees' Retirement System is included in the Annual Comprehensive Financial Report for the State of North Carolina. The State's Annual Comprehensive Financial Report includes financial statements and required supplementary information for LGERS. That report may be obtained by writing to the Office of the State Controller, 1410 Mail Service Center, Raleigh, North Carolina 27699-1410, by calling (919) 981-5454, or at www.osc.nc.gov.

Benefits Provided. LGERS provides retirement and survivor benefits. Retirement benefits are determined as 1.85% of the member's average final compensation times the member's years of creditable service. A member's average final compensation is calculated as the average of a member's four highest consecutive years of compensation. Plan members are eligible to retire with full retirement benefits at age 65 with five years of creditable service, at age 60 with 25 years of creditable service, or at any age with 30 years of creditable service. Plan members are eligible to retire with partial retirement benefits at age 50 with 20 years of creditable service or at age 60 with five years of creditable service (age 55 for firefighters). Survivor benefits are available to eligible beneficiaries of members who die while in active service or within 180 days of their last day of service and who have either completed 20 years of creditable service regardless of age (15 years of creditable service for firefighters and rescue squad members who are killed in the line of duty) or have completed five years of service and have reached age 60. Eligible beneficiaries may elect to receive a monthly Survivor's Alternate Benefit for life or a return of the member's contributions. The plan does not provide for automatic post-retirement benefit increases. Increases are contingent upon actuarial gains of the plan.

Contributions. Contribution provisions are established by General Statute 128-30 and may be amended only by the North Carolina General Assembly. Town of Archer Lodge employees are required to contribute 6% of their compensation. Employer contributions are actuarially determined and set annually by the LGERS Board of Trustees. The Town of Archer Lodge's contractually required contribution rate for the year ended June 30, 2024, was 13.61% for general employees, actuarially determined as an amount that, when combined with employee contributions, is expected to finance the costs of benefits earned by employees during the year. Contributions to the pension plan from the Town of Archer Lodge were \$65,705 for the year ended June 30, 2024.

Refunds of Contributions – Town employees, who have terminated service as a contributing member of LGERS, may file an application for a refund of their contributions. By state law, refunds to members with at least five years of service include 4% interest. State law requires a 60-day waiting period after service termination before the refund may be paid. The acceptance of a refund payment cancels the individual's right to employer contributions, or any other benefit provided by LGERS.

Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions

At June 30, 2024, the Town reported a liability of \$197,302 for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2023. The total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of December 31, 2022. The total pension liability was then rolled forward to the measurement date of June 30, 2023, utilizing update procedures incorporating the actuarial assumptions. The Town’s proportion of the net pension liability was based on a projection of the Town’s long-term share of future payroll covered by the pension plan, relative to the projected future payroll covered by the pension plan of all participating LGERS employers, actuarially determined. At June 30, 2023 (measurement date), the Town’s proportion was 0.00298%, which was an increase of 0.00138% from its proportion measured as of June 30, 2022.

For the year ended June 30, 2024, the Town recognized pension expense of \$76,479. At June 30, 2024, the Town reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 21 985	\$ 473
Changes in assumptions	8 384	-
Net difference between projected and actual earnings on pension plan investments	52 807	-
Changes in proportion and differences between Town contributions and proportionate share of contributions	46 211	-
Town contributions subsequent to the measurement date	65 705	-
Total	<u>\$ 195 092</u>	<u>\$ 473</u>

The \$65,705 reported as deferred outflows of resources related to pensions resulting from Town contributions subsequent to the measurement date will be recognized as a decrease of the net pension liability in the year ended June 30, 2024. Other amounts reported as deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Year ending June 30:	
2025	\$ 48 642
2026	29 879
2027	48 160
2028	2 233
2029	-
Thereafter	-

Actuarial Assumptions. The total pension liability in the December 31, 2023, actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.5 percent
Salary increases	3.25 to 8.25 percent, including inflation & productivity factor
Investment rate of return	6.50%, net of pension plan investment expense, including inflation

The plan currently uses mortality tables that vary by age, gender, employee group (i.e., general, law enforcement officer) and health status (i.e., disabled, and healthy). The current mortality rates are based on published tables and

based on studies that cover significant portions of the U.S. population. The healthy mortality rates also contain a provision to reflect future mortality improvements.

The actuarial assumptions used in the December 31, 2022, valuation were based on the results of an actuarial experience study for the period January 1, 2015, through December 31, 2019.

Future ad hoc COLA amounts are not considered to be substantively automatic and are therefore not included in the measurement.

The projected long-term investment returns, and inflation assumptions are developed through review of current and historical capital markets data, sell-side investment research, consultant whitepapers, and historical performance of investment strategies. Fixed income returns projections reflect current yields across the U.S. Treasury yield curve and market expectations of forward yields projected and interpolated for multiple tenors and over multiple year horizons. Global public equity return projections are established through analysis of the equity risk premium and the fixed income return projections. Other asset categories and strategies' return projections reflect the foregoing and historical data analysis. These projections are combined to produce the long-term expected rate of return by weighing the expected future real rates of return by the target asset allocation percentage and by adding expected inflation. The target allocation and best estimates of arithmetic real rates of return for each major asset class as of June 30, 2023, are summarized in the following table:

<u>Asset Class</u>	<u>Target Allocation</u>	<u>Long-Term Expected Real Rate of Return</u>
Fixed Income	33.0%	2.4%
Global Equity	38.0%	6.9%
Real Estate	8.0%	6.0%
Alternatives	8.0%	8.6%
Credit	7.0%	5.3%
Inflation Protection	6.0%	4.3%
Total	<u>100.0%</u>	

The information above is based on 30-year expectations developed with an investment consulting firm's 2024 long-term capital market assumptions. The long-term nominal rates of return underlying the real rates of return are arithmetic annualized figures. The real rates of return are calculated from nominal rates by multiplicatively subtracting a long-term inflation assumption of 2.38%. All rates of return and inflation are annualized figures. Source data provided in the 2023 Annual Comprehensive Financial Report published on the website of the [NC Office of State Controller](#).

Discount rate. The discount rate used to measure the total pension liability was 6.5%. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current contribution rate and that contributions from employers will be made at statutorily required rates, actuarially determined. Based on these assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of the current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the Town's proportionate share of the net pension asset to changes in the discount rate. The following presents the Town's proportionate share of the net pension asset calculated using the discount rate of 6.50 percent, as well as what the Town's proportionate share of the net pension asset or net pension liability would be if it were calculated using a discount rate that is one percentage point lower (5.50 percent) or one percentage point higher (7.50 percent) than the current rate:

	<u>1% Decrease (5.50%)</u>	<u>Discount Rate (6.50%)</u>	<u>1% Increase (7.50%)</u>
Town's proportionate share of the net pension liability (asset)	\$ 341 818	\$ 197 302	\$ 78 323

Pension plan fiduciary net position. Detailed information about the pension plan's fiduciary net position is available in the separately issued Annual Comprehensive Financial Report for the State of North Carolina.

Total Expense, Liabilities, and Deferred Outflows and Inflows of Resources Related to Pensions

The following is information related to the proportionate share and pension expense for all pension plans:

	<u>LGERS</u>	<u>Total</u>
Pension Expense	\$ 76 479	\$ 76 479
Pension Liability	197 302	197 302
Proportionate share of the net pension liability	0.00298%	0.00298%
Deferred Outflows of Resources:		
Differences between expected and actual experience	21 985	21 985
Changes of assumptions	8 384	8 384
Net difference between projected and actual earnings on plan investments	52 807	52 807
Changes in proportion and differences between contributions and proportionate share of contributions	46 211	46 211
Benefit payments and administrative costs paid subsequent to the measurement date	65 705	65 705
Deferred Inflows of Resources:		
Differences between expected and actual experience	473	473
Changes of assumptions	-	-
Net difference between projected and actual earnings on plan investments	-	-
Changes in proportion and differences between contributions and proportionate share of contributions	-	-

b. Supplemental Retirement Income Plan for General Employees

Plan Description. The Town contributes to the Supplemental Retirement Income Plan (Plan), a defined contribution pension plan administrated by the Department of the State Treasurer and a Board of Trustees. The Plan provides retirement benefits to the general employees of the Town. Article 5 of G.S. Chapter 135 assigns the authority to establish and amend benefit provisions to the North Carolina Assembly.

Funding Policy. The Town has elected to contribute each month an amount equal to five percent of each employee's salary, and all amounts contributed are vested immediately. Also, the general employees may make voluntary contributions to the plan. Contributions for the year ended June 30, 2024, were \$94,671 which consisted of \$65,705 from the Town and \$28,966 from the general employees.

2. Deferred Outflows and Inflows of Resources

The Town of Archer Lodge has the following deferred outflows of resources:

<u>Source</u>	<u>Amount</u>
Contribution to pension plan in current fiscal year	\$ 65 705
Differences between expected and actual experience	21 985
Changes in assumptions	8 384
Net difference between projected and actual earnings on plan investments	52 807
Changes in proportion and differences between employer contributions and proportionate share of contributions	46 211
Total	<u>\$ 195 092</u>

Deferred inflows of resources at year end are comprised of the following:

	<u>Statement of Net Position</u>	<u>General Fund Balance Sheet</u>
Prepaid Taxes (General Fund)	\$ 662	\$ 662
Taxes receivable (General Fund), less penalties	-	1 568
Net difference between projected and actual earnings on plan investments	473	-
Total	<u>\$ 1 135</u>	<u>\$ 2 230</u>

3. Risk Management

The Town is exposed to various risks of loss related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. The Town participates in self-funded risk-financing pools administered by the North Carolina League of Municipalities. Through these pools, the Town obtains general liability coverage of \$2 million per occurrence, property coverage up to the total insured values of the property policy, workers' compensation coverage up to the statutory limits, public officials' liability coverage of \$1 million per occurrence, and employee health coverage. The liability and property exposures are reinsured through commercial carriers for claims in excess of retentions as selected by the Board of Trustees each year. Excess insurance coverage is purchased by the Board of Trustees to protect against large workers' compensation claims that exceed certain dollar cost levels. Medical stop loss insurance is purchased by the Board of Trustees to protect against large medical claims that exceed certain dollar cost levels. Specific information on the limits of the reinsurance, excess and stop loss policies purchased by the Board of Trustees can be obtained by contacting the Risk Management Services Department of the NC League of Municipalities. The pools are audited annually by certified public accountants, and the audited financial statements are available to the Town upon request.

There have been no significant reductions in insurance coverage from the prior year, nor were there any settled claims in any of the past three fiscal years.

The Town does not carry flood insurance through the National Flood Insurance Plan (NFIP). Because the Town is not in an area of the State that has been mapped and designated an "A" area (an area close to a river, lake, or stream) by the Federal Emergency Management Agency, the Town is not eligible to purchase coverage of \$500,000 per structure through the NFIP.

In accordance with G.S. 159-29, the Town's employees that have access to \$100 or more at any given time of the Town's funds are performance bonded through a commercial surety bond. The finance officer is bonded for \$325,000.

4. Claims, Judgments and Contingent Liabilities

On June 30, 2024, the Town was not a defendant to any lawsuits.

5. Long-Term Obligations

a. Installment Purchase

On March 22, 2012, the Town entered into an installment purchase agreement of \$500,000 to finance the land acquisition and construction of a town hall building. The financing contract requires fifteen annual principal payments of \$33,333 with an interest rate of 3.41%.

Annual debt service principal and interest payments for the installment purchase as of June 30, 2024, are as follows:

Year Ending June 30	Direct Placement Governmental Activities	
	Principal	Interest
2025	\$ 33 333	\$ 3 410
2026	33 333	2 273
2027	33 334	1 137
Total	\$ 100 000	\$ 6 820

In July 2018, the Town entered into an installment purchase agreement of \$400,000 to finance the land acquisition for parks development. The financing contract requires eight annual principal payments of \$50,000 with an interest rate of 4.00%.

Annual debt service principal and interest payments for the installment purchase as of June 30, 2024, are as follows:

Year Ending June 30	Direct Placement Governmental Activities	
	Principal	Interest
2025	\$ 50 000	\$ 6 000
2026	50 000	4 000
2027	50 000	2 000
Total	\$ 150 000	\$ 12 000

In September 2018, the Town entered into an installment purchase agreement of \$405,000 to finance the construction of the town hall expansion project. The financing contract requires fifteen annual principal payments of \$27,000 with an interest rate of 3.37%.

Annual debt service principal and interest payments of the installment purchase as of June 30, 2024, are as follows:

Year Ending June 30	Direct Placement Governmental Activities	
	Principal	Interest
2025	\$ 27 000	\$ 9 124
2026	27 000	8 189
2027	27 000	7 279
2028	27 000	6 369
2029	27 000	5 474
2030-2034	135 000	13 654
Total	\$ <u>270 000</u>	\$ <u>50 089</u>

b. Subscriptions

For the year ended June 30, 2024, the Town implemented the requirements of GASB Statement No. 96, Subscription -Based Information Technology Arrangements (Subscriptions). The Statement provides a definition of Subscriptions and provides uniform guidance for accounting and financial reporting for such transactions. The guidance will decrease diversity in the accounting and financial reporting for these transactions, thereby increasing comparability in financial reporting among governments. Further, the reporting of a subscription asset (a right-to-use intangible capital asset) and a subscription liability will enhance the relevance and reliability of the financial statements.

During the current year, the Town entered into a new Subscription for a web-based Human Resources and Parks/Recreation management solutions. The term of the agreement is five years. The subscription does not have a stated interest rate. Accordingly, the Town's estimated incremental borrowing rate of 1.25% was used to discount the subscription payments. The initial liability for the subscription was \$60,403. The liability balance remaining on June 30, 2024, was \$38,545.

The future minimum subscription obligation payments as of June 30, 2024.

Year Ending June 30	Principal	Interest
2025	\$ 10 903	\$ 482
2026	11 179	346
2027	11 461	206
2028	5 002	63
Total	\$ <u>38 545</u>	\$ <u>1 097</u>

c. Changes in Long-Term Liabilities

	<u>Beginning Balance</u>	<u>Increases</u>	<u>Decreases</u>	<u>Ending Balance</u>	<u>Current Portion of Balance</u>
Governmental activities:					
Installment purchases	\$ 630 334	\$ -	\$ 110 334	\$ 520 000	\$ 110 333
IT Subscription liabilities	51 403	-	12 858	38 545	11 385
Net pension liability (LGERS)	90 263	107 039	-	197 302	-
Compensated absences	24 785	15 795	-	40 580	-
Governmental activities long – term liabilities	<u>\$ 796 785</u>	<u>\$ 122 834</u>	<u>\$ 123 192</u>	<u>\$ 796 427</u>	<u>\$ 121 718</u>

C. Interfund Balances and Activity

There were no balances due to/from other funds at June 30, 2024.

Transfers to/from other funds at June 30, 2024, consists of the following:

From the General Fund to the Regional Econ Development Fund	\$ 2 365 000
From the General Fund to Park Reserve Fund	86 623
From the Park Reserve Fund to the General Fund	58 000
From the Capital Reserve Fund to the General Fund	<u>125 000</u>
Total transfers	<u>\$ 2 634 623</u>

Transfers are used to move revenues to finance various programs that the government must account for in other funds in accordance with budgetary authorizations, including amounts provided matching funds for various programs. Since the Town of Archer Lodge was first incorporated, the governing board has chosen to set aside funds for future law enforcement needs and for future general capital needs. In addition, three cents of the twenty-two cents ad valorem tax rate have been assigned each year to a Park Reserve Fund. Collections of this tax are accounted for in the General Fund and transferred each year to the Park Reserve Fund. The Town set up a separate Capital Project Fund for the Parks project and it is partially funded by transfers from the Park Reserve fund. When the Town receives grant funds, they are usually deposited into the General Fund and then transferred to an identified capital or special revenue fund.

D. Fund Balance

The following schedule provides management and citizens with information on the portion of General Fund balance that is available for appropriation:

Total fund balance – General Fund	\$ 1 290 913
Less:	
Stabilization by State Statute	214 908
Subsequent year’s expenditures	56 405
Remaining Fund Balance	1 019 600

Encumbrances	General Fund	REDR Fund	Non-Major Funds
\$	56 405	\$ 26 230	\$ 24 505

IV. Related Party Transactions

There were no related party transactions noted during the fiscal year ended June 30, 2024.

V. Summary Disclosure of Significant Contingencies

The Town received proceeds from federal and State grants. Periodic audits of these grants are required, and certain cost may be questioned as not being appropriate expenditures under the grant agreements. Such audits could result in the refund of grant money to the grantor agencies. Management believes that any required refund will be immaterial. No provision has been made in the accompanying financial statement for the refund of the grant money.

Required Supplementary Financial Data

This section contains additional information required by generally accepted accounting principles.

- Schedule of Proportionate Share of the Net Pension Liabilities for Local Government Employees' Retirement System
- Schedule of Contributions to Local Government Employees' Retirement System

Town of Archer Lodge, North Carolina
Town of Archer Lodge's Proportionate Share of Net Pension Liability (Asset)
Local Government Employees' Retirement System
Last Ten Fiscal Years*

<u>Year Ended June 30</u>	<u>Town's Proportion of the net pension liability (asset) (%)</u>	<u>Town's proportion of the net pension liability (asset)</u>	<u>Town's covered employee payroll</u>	<u>Town's proportionate share of the net pension liability (asset) as a percentage of its covered employee payroll</u>	<u>Plan fiduciary net position as a percentage of total pension liability</u>
2024	0.00298%	\$ 41 471	\$ 328 611	12.62%	82.49%
2023	0.00160%	21 277	179 252	11.87%	84.14%
2022	0.00158%	24 231	161 828	14.97%	95.51%
2021	0.00118%	42 166	117 292	35.95%	88.61%
2020	0.00129%	35 229	108 711	32.41%	90.86%
2019	0.00139%	32 976	100 663	32.76%	91.63%
2018	0.00121%	18 485	67 849	27.24%	94.18%
2017	0.00139%	29 500	58 551	50.38%	91.47%
2016	0.00059%	2 648	46 313	5.72%	98.09%
2015	0.00017%	(1 003)	35 490	(2.83%)	102.64%

*The amounts presented for each fiscal year were determined as of the prior fiscal year ending June 30.

Town of Archer Lodge, North Carolina
Schedule of Contributions
Local Government Employees' Retirement System
Last Ten Fiscal Years

Year Ended June 30	Contractually required contribution	Contributions in relation to the contractually required contribution	Contribution deficiency (excess)	Town's covered employee payroll	Contributions as a percentage of covered-employee payroll
2024	\$ 65 705	\$ 65 705	\$ -	\$ 482 772	13.61%
2023	42 227	42 227	-	328 611	12.85%
2022	21 681	21 681	-	179 252	12.09%
2021	17 558	17 558	-	161 828	10.85%
2020	11 307	11 307	-	117 292	9.64%
2019	9 284	9 284	-	108 711	8.54%
2018	8 284	8 284	-	100 663	8.23%
2017	5 323	5 323	-	67 849	7.85%
2016	4 216	4 216	-	58 551	7.20%
2015	3 520	3 520	-	46 313	7.60%

Individual Fund Statements and Schedules

**Town of Archer Lodge, North Carolina
General Fund
Statement of Revenues, Expenditures, and
Changes in Fund Balance – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	Budget	Actual	Variance Positive (Negative)
Revenues:			
Ad valorem taxes:			
Taxes	\$	\$ 1 302 783	\$
Interest		3 354	
Total	1 292 500	1 306 137	13 637
Unrestricted intergovernmental:			
Local option sales taxes		409 622	
Franchise taxes		168 225	
Beer and wine tax		25 111	
ABC profit distribution		21 861	
Total	565 000	624 819	59 819
Restricted intergovernmental:			
PEG channel support		51 613	
Park Land Grant Proceeds		2 365 000	
JoCo Open Space/Community grant		47 500	
Total	2 464 000	2 464 113	113
Permits and fees:			
Planning and zoning revenue		11 465	
Animal control fees		305	
Total	84 000	11 770	(72 230)
Sales and services:			
Parks & Recreation charges		74 653	
Total	74 000	74 653	653
Investment earnings	70 000	68 129	(1 871)
Miscellaneous:			
Miscellaneous		12 301	
Total	14 000	12 301	(1 699)
Total Revenues	4 563 500	4 561 922	(1 578)

(continued)

**Town of Archer Lodge, North Carolina
General Fund
Statement of Revenues, Expenditures, and
Changes in Fund Balance – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	<u>Budget</u>	<u>Actual</u>	<u>Variance Positive (Negative)</u>
Expenditures:			
General government:			
Town Council			
Salaries and employee benefits		18 135	
Other operating expenditures		39 411	
Total	<u>66 615</u>	<u>57 546</u>	<u>9 069</u>
Administration:			
Salaries and employee benefits		317 771	
Professional services		18 000	
Contracted services		12 072	
PEG Media Group		51 613	
Other operating expenditures		33 745	
Total	<u>460 950</u>	<u>433 201</u>	<u>27 749</u>
Tax Collections:			
Collection fees		33 901	
Total	<u>36 000</u>	<u>33 901</u>	<u>2 099</u>
Legal:			
Contracted services		13 600	
Total	<u>18 000</u>	<u>13 600</u>	<u>4 400</u>
Tax			
Taxes		3	
Total	<u>100</u>	<u>3</u>	<u>97</u>
Public Buildings			
Utility service fees		29 334	
Repairs and maintenance		6 912	
Contracted services		372 823	
Other operating expenses		69 473	
Total	<u>550 589</u>	<u>478 542</u>	<u>72 047</u>
Total general government	<u>1 132 254</u>	<u>1 016 793</u>	<u>115 461</u>

(continued)

**Town of Archer Lodge, North Carolina
General Fund
Statement of Revenues, Expenditures, and
Changes in Fund Balance – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	<u>Budget</u>	<u>Actual</u>	<u>Variance Positive (Negative)</u>
Public safety:			
Police and Animal Control:			
Other operating services		4 411	
Total	<u>207 000</u>	<u>4 411</u>	<u>202 589</u>
Fire:			
Fire protection services		514 094	
Total	<u>505 000</u>	<u>514 094</u>	<u>(9 094)</u>
Total public safety	<u>712 000</u>	<u>518 505</u>	<u>193 495</u>
Transportation:			
Streets and highways:			
Street lighting		7 201	
Other operating expenditures		12 598	
Total transportation	<u>27 000</u>	<u>19 799</u>	<u>7 201</u>
Economic and physical development:			
Planning and zoning:			
Salaries and employee benefits		114 156	
Other operating expenditures		8 574	
Contracted services		69 103	
Total economic and physical development	<u>253 100</u>	<u>191 833</u>	<u>61 267</u>
Culture and recreation			
Parks and recreation			
Salaries and employee benefits		257 988	
Professional fees		5 033	
Other operating expenditures		140 829	
Contracted services		49 143	
Capital outlay		431 638	
Total culture and recreation	<u>982 247</u>	<u>884 631</u>	<u>97 616</u>

(continued)

**Town of Archer Lodge, North Carolina
General Fund
Statement of Revenues, Expenditures, and
Changes in Fund Balance – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	Budget	Actual	Variance Positive (Negative)
Debt Service			
Principal retirement	110 336	123 191	(12 855)
Interest and other charges	22 560	23 193	(633)
Total debt service	132 896	146 384	(13 488)
 Total expenditures	 3 239 497	 2 777 945	 461 552
 Revenues over (under) expenditures	 1 324 003	 1 783 977	 459 974
 Other financing sources (uses):			
Transfers from other funds:			
Park Reserve Fund	58 000	58 000	-
Public Safety Reserve Fund	200 000	-	(200 000)
Capital Reserve Fund	125 000	125 000	-
Transfers to other funds:			
Parks Reserve Fund	(162 000)	(86 623)	75 377
REDR Fund	(2 365 000)	(2 365 000)	-
Total	(2 144 000)	(2 268 623)	(124 623)
 Fund balance appropriated	 500 000	 -	 (500 000)
 Net change in fund balance	 \$ (319 997)	 (484 646)	 \$ (164 649)
 Fund balances, beginning		 1 775 559	
Fund balances, ending		 \$ 1 290 913	

Town of Archer Lodge, North Carolina
Regional Economic Development Reserve (REDR) Grant Capital Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024

	Project Author- ization	Prior Year	Actual Current Year	Total to Date	Variance Positive (Negative)
Revenues					
Intergovernmental					
State REDR grant	\$ -	\$ -	\$ -	\$ -	\$ -
Investment earnings	-	-	32 723	32 723	32 723
Total revenues	-	-	32 723	32 723	32 723
Expenditures					
Capital outlay:					
Construction	2 365 000	-	4 910	4 910	2 360 090
Total Expenditures	2 365 000	-	4 910	4 910	2 360 090
Revenues under expenditures	(2 365 000)		27 813	27 813	2 392 813
Other Financing Sources/Uses					
Interfund transfers					
State Economic Development Research Grant	2 365 000	-	2 365 000	2 365 000	-
Total other financing sources	2 365 000	-	2 365 000	2 365 000	-
Net change in fund balance	\$ -	\$ -	2 392 813	\$ 2 392 813	\$ 2 392 813
Fund Balance Beginning			-		
Fund Balance Ending			\$ 2 392 813		

**Town of Archer Lodge, North Carolina
Combining Balance Sheet
Non-major Governmental Funds
For the Year Ended June 30, 2024**

	Park Reserve Fund	Capital Reserve Fund	Public Safety Reserve	Park Capital Project	ARPA Parks Capital	SCIF Parks Capital	Total Non-Major Governmental Funds
Assets							
Cash and cash equivalents	\$ 89 911	\$ 28 428	\$ 441 596	\$ 2 966	\$ 209	\$ 275 595	\$ 838 705
Total assets	<u>89 911</u>	<u>28 428</u>	<u>441 596</u>	<u>2 966</u>	<u>209</u>	<u>275 595</u>	<u>838 705</u>
Liabilities and Fund Balances							
Fund balances:							
Restricted	-	-	-	2 966	209	251 090	254 265
Assigned	89 911	28 428	441 596				559 935
Subsequent year's appropriation	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>24 505</u>	<u>24 505</u>
Total liabilities and fund balances	<u>\$ 89 911</u>	<u>\$ 28 428</u>	<u>\$ 441 596</u>	<u>\$ 2 966</u>	<u>\$ 209</u>	<u>\$ 275 595</u>	<u>\$ 838 705</u>

Town of Archer Lodge, North Carolina
Combining Statement of Revenues, Expenditures, and Changes in Fund Balance
Non-major Governmental Funds
For the Year Ended June 30, 2024

	Park Reserve Fund	Capital Reserve Fund	Public Safety Reserve	Park Capital Project	ARPA Parks Capital	SCIF Parks Capital	Total Non-major Governmental Funds
Revenues							
Restricted intergovernmental	\$ -	\$ -	\$ -	\$ 78 293	\$ 184 285	\$ -	\$ 262 578
Investment earnings	1 864	2 420	20 587	-	1 878	10 938	37 687
Total revenue	<u>1 864</u>	<u>2 420</u>	<u>20 587</u>	<u>78 293</u>	<u>186 163</u>	<u>10 938</u>	<u>300 265</u>
Expenditures							
Construction	-	-	-	75 328	185 954	325 605	586 887
Total expenditures	<u>-</u>	<u>-</u>	<u>-</u>	<u>75 328</u>	<u>185 954</u>	<u>325 605</u>	<u>586 887</u>
Revenues over expenditures	1 864	2 420	20 587	2 965	209	(314 667)	(286 622)
Other financing sources (uses)							
Transfer from other sources	86 623	-	-	-	-	-	86 623
Transfer to other sources	(58 000)	(125 000)	-	-	-	-	(183 000)
Total other financing sources	<u>28 623</u>	<u>(125 000)</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(96 377)</u>
Net change in fund balance	30 487	(122 580)	20 587	2 965	209	(314 667)	(382 999)
Fund balance beginning	59 424	151 008	421 009	1	-	590 262	1 221 704
Fund balance ending	<u>\$ 89 911</u>	<u>\$ 28 428</u>	<u>\$ 441 596</u>	<u>\$ 2 966</u>	<u>\$ 209</u>	<u>\$ 275 595</u>	<u>\$ 838 705</u>

Town of Archer Lodge, North Carolina
Park Reserve Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024

	Budget		Actual	Variance Positive (Negative)
Revenues				
Investment earnings	\$ 1 000	\$	1 864	\$ 864
Total revenues	1 000		1 864	864
Expenditures				
Capital outlay:				
Construction	-		-	-
Total Expenditures	-		-	-
Revenues under expenditures	1 000		1 864	864
Other Financing Sources/Uses				
Interfund transfers				
Transfers from other funds				
From General Fund	162 000		86 623	(75 377)
Transfers to other funds				
To General Fund	(58 000)		(58 000)	-
To Town Park Fund	(50 000)		-	50 000
To Fund Balance Reserves	(55 000)		-	55 000
Total other financing sources	(1 000)		28 623	29 623
Appropriated fund balance	-		-	-
Net change in fund balance	\$ -		30 487	\$ 30 487
Fund Balance Beginning			59 424	
Fund Balance Ending		\$	89 911	

**Town of Archer Lodge, North Carolina
Capital Town Park Project Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	Budget	Actual		Total to Date	Variance Positive (Negative)
		Prior Years	Current Year		
Revenues					
Restricted intergovernmental:					
State Grant	\$ 500 000	\$ 416 771	\$ 78 293	\$ 495 064	\$ (4 936)
Total revenues	<u>500 000</u>	<u>416 771</u>	<u>78 293</u>	<u>495 064</u>	<u>(4 936)</u>
Expenditures					
Capital outlay:					
Design/engineering	146 342	146 311	-	146 311	31
Construction	863 008	737 758	75 328	813 086	49 922
Contingency	40 650	40 603	-	40 603	47
Total Expenditures	<u>1 050 000</u>	<u>924 672</u>	<u>75 328</u>	<u>1 000 000</u>	<u>50 000</u>
Revenues under expenditures	(550 000)	(507 901)	2 965	(504 936)	45 064
Other Financing Sources/Uses					
Interfund transfers					
Transfers from other funds					
From General Fund	50 000	50 000	-	50 000	-
From Park Reserve Fund	500 000	457 902	-	457 902	(42 098)
Total other financing sources	<u>550 000</u>	<u>507 902</u>	<u>-</u>	<u>507 902</u>	<u>(42 098)</u>
Appropriated fund balance	-	-	-	-	-
Net change in fund balance	<u>\$ 1</u>	<u>\$ 1</u>	2 965	<u>\$ 2 966</u>	<u>\$ 2 966</u>
Fund Balance Beginning			<u>1</u>		
Fund Balance Ending			<u>\$ 2 966</u>		

Town of Archer Lodge, North Carolina
Capital Reserve Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024

	<u>Budget</u>	<u>Actual</u>	<u>Variance Positive (Negative)</u>
Revenues			
Investment earnings	\$ 3 000	\$ 2 420	\$ (580)
Total revenues	<u>3 000</u>	<u>2 420</u>	<u>(580)</u>
Expenditures:			
Current:			
Total expenditures	<u>-</u>	<u>-</u>	<u>-</u>
Revenues over expenditures	<u>3 000</u>	<u>2 420</u>	<u>(580)</u>
Other financing sources:			
Interfund transfers			
Transfer to general fund	<u>(125 000)</u>	<u>(125 000)</u>	<u>-</u>
Total other financing sources	<u>(125 000)</u>	<u>(125 000)</u>	<u>-</u>
Appropriated fund balance	<u>125 000</u>	<u>-</u>	<u>(125 000)</u>
Net change in fund balance	\$ <u>3 000</u>	(122 580)	\$ <u>(125 580)</u>
Fund balance, beginning		<u>151 008</u>	
Fund balance, ending		<u>\$ 28 428</u>	

**Town of Archer Lodge, North Carolina
American Rescue Plan Project Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	Project Author- ization	Prior Year	Actual Current Year	Total to Date	Variance Positive (Negative)
Revenues					
Restricted intergovernmental Federal Grant	\$ -	\$ 340 928	\$ 184 285	\$ 525 213	\$ 525 213
Investment earnings	3 150	5 714	1 878	7 592	4 442
Total revenues	<u>3 150</u>	<u>346 642</u>	<u>186 163</u>	<u>532 805</u>	<u>529 665</u>
Expenditures					
Other expenditures	17 000	17 228	-	17 228	(228)
Capital outlay:					
Construction	1 036 577	854 627	185 954	1 040 581	(4 004)
Total Expenditures	<u>1 053 577</u>	<u>871 855</u>	<u>185 954</u>	<u>1 057 809</u>	<u>(4 232)</u>
Revenues under expenditures	(1 050 427)	(525 213)	209	(525 004)	525 423
Other Financing Sources/Uses					
Interfund transfers					
Transfers from other funds					
From General Fund	1 050 427	525 213	-	525 213	(525 214)
Total other financing sources	<u>1 050 427</u>	<u>525 213</u>	<u>-</u>	<u>525 213</u>	<u>(525 214)</u>
Net change in fund balance	\$ <u>-</u>	\$ <u>-</u>	209	\$ <u>209</u>	\$ <u>209</u>
Fund Balance Beginning			-		
Fund Balance Ending			<u>\$ 209</u>		

**Town of Archer Lodge, North Carolina
State Capital & Infrastructure Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	Project Author- ization	Prior Year	Actual Current Year	Total to Date	Variance Positive (Negative)
Revenues					
Investment earnings	\$ 3 250	\$ 8 081	\$ 10 938	\$ 19 019	\$ 15 769
Total revenues	<u>3 250</u>	<u>8 081</u>	<u>10 938</u>	<u>19 019</u>	<u>15 769</u>
Expenditures					
Capital outlay:					
Construction	853 250	267 819	325 605	593 424	259 826
Total Expenditures	<u>853 250</u>	<u>267 819</u>	<u>325 605</u>	<u>593 424</u>	<u>259 826</u>
Revenues under expenditures	(850 000)	(259 738)	(314 667)	(574 405)	275 595
Other Financing Sources/Uses					
Interfund transfers					
Transfers from other funds					
From General Fund-Grant					
Revenue	850 000	850 000	-	850 000	-
Total other financing sources	<u>850 000</u>	<u>850 000</u>	<u>-</u>	<u>850 000</u>	<u>-</u>
Net change in fund balance	\$ <u>-</u>	\$ <u>590 262</u>	(314 667)	\$ <u>275 595</u>	\$ <u>(275 595)</u>
Fund Balance Beginning			590 262		
Fund Balance Ending			<u>\$ 275 595</u>		

**Town of Archer Lodge, North Carolina
Public Safety Reserve Fund
Schedule of Revenues, Expenditures, and
Changes in Fund Balances – Budget and Actual
For the Fiscal Year Ended June 30, 2024**

	Budget	Actual	Variance Positive (Negative)
Revenues			
Investment earnings	\$ 20 000	\$ 20 587	\$ 587
Total revenues	20 000	20 587	587
Expenditures:			
Current:	-	-	-
Total expenditures	-	-	-
Revenues over expenditures	20 000	20 587	587
Other financing sources:			
Transfers from other funds	-	-	-
Transfer (to) other funds	-	-	-
Total other financing sources	-	-	-
Net change in fund balance	\$ 20 000	20 587	\$ 587
Fund balance, beginning		421 009	
Fund balance, ending		\$ 441 596	

Other Schedules

This section contains additional information required on property taxes

- Schedule of Ad Valorem Taxes Receivable

- Analysis of Current Tax Levy

**Town of Archer Lodge, North Carolina
Schedule of Ad Valorem Taxes Receivable
June 30, 2024**

<u>Fiscal Year</u>	<u>Uncollected Balance June 30, 2023</u>	<u>Additions</u>	<u>Collections And Credits</u>	<u>Uncollected Balance June 30, 2024</u>
2023-2024	\$ -	\$ 1 303 533	\$ 1 302 692	\$ 841
2022-2023	150	-	78	72
2021-2022	123	-	7	116
2020-2021	147	-	6	141
2019-2020	149	-	-	149
2018-2019	7	-	-	7
2017-2018	8	-	-	8
2016-2017	10	-	-	10
2015-2016	8	-	-	8
2014-2015	-	-	-	-
	<u>\$ 602</u>	<u>\$ 1 303 533</u>	<u>\$ 1 302 783</u>	<u>\$ 1352</u>
			Ad valorem taxes receivable - net	<u>\$ 1352</u>

Reconciliation with revenues:

Ad valorem taxes – General Fund	\$ 1 306 137
Reconciling items:	
Interest collected	<u>(3 354)</u>
Subtotal	<u>(3 354)</u>
Total collections and credits	<u>\$ 1 302 783</u>

Town of Archer Lodge, North Carolina
Analysis of Current Tax Levy
Town – Wide Levy
For the Fiscal Year Ended June 30, 2024

	<u>Town-Wide</u>		<u>Total Levy</u>		
	<u>Property Valuation</u>	<u>Rate</u>	<u>Total Levy</u>	<u>Property Excluding Registered Motor Vehicles</u>	<u>Registered Motor Vehicles</u>
Original levy:					
Property taxed at current rate	\$ 429 132 333	0.30	\$ 1 287 397	\$ 1 104 096	\$ 183 301
Penalties	-		-	-	-
Total	<u>420 132 333</u>		<u>1 287 397</u>	<u>1 104 096</u>	<u>183 301</u>
Discoveries:					
Current year taxes	<u>5 975 000</u>	0.30	<u>17 925</u>	<u>17 925</u>	-
Releases	<u>(596 333)</u>	0.30	<u>(1 789)</u>	<u>(1 789)</u>	-
Total property valuation	<u>\$ 434 511 000</u>				
Net levy			1 303 533	1 120 232	183 301
Uncollected taxes at June 30, 2024			<u>(841)</u>	<u>(841)</u>	-
Current year's taxes collected			\$ <u>1 302 692</u>	\$ <u>1 119 391</u>	\$ <u>183 301</u>
Current levy collection percentage			<u>99.94%</u>	<u>99.92%</u>	<u>100.00%</u>

COMPLIANCE SECTION

May & Place, PA

CERTIFIED PUBLIC ACCOUNTANTS

P.O. Box 900
Louisburg, NC 27549
Bus: 919-496-3041
Fax: 919-496-6342

SCOTT H. MAY, CPA
DALE R. PLACE, CPA, CFE

Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on An Audit of Financial Statements Performed in Accordance with Government Auditing Standards

Independent Auditor's Report

To the Honorable Mayor and
Members of the Town Council
Town of Archer Lodge, North Carolina

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the accompanying financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of the Town of Archer Lodge, North Carolina, as of and for the year ended June 30, 2024, and the related notes to the financial statements, which collectively comprises the Town of Archer Lodge's basic financial statements, and have issued our report thereon dated December 12, 2024.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Town of Archer Lodge's internal control over financial reporting (internal control) as a basis for designing the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Town of Archer Lodge's internal control. Accordingly, we do not express an opinion on the effectiveness of the Town's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. *A material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented or detected and corrected on a timely basis. *A significant deficiency*, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we considered material weaknesses. However, material weaknesses may exist that have not been identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Town of Archer Lodge's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

May and Place, PA

May & Place, PA
Louisburg, North Carolina
December 12, 2024



**Work Session - Minutes
Monday, April 21, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Buzzelli
Council Member Jackson
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

STAFF ABSENT:

Kim P. Batten, Assist. Town Admin./Finance Officer (listened remotely)

1 WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:33 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2 PLANNING DISCUSSIONS CONTINUED:

a) Discussion on the following items:

- Mr. Chadwick shared that he attended the Mayor's Association meeting regarding updated sewer system information. He provided information that was presented at the meeting. Mr. Chadwick shared that since this discussion was held at the Mayor's Association meeting and that in his opinion, it is only fair for him to present the same information to Council. Discussion followed. The general consensus of the discussion determined now is not the best time for the Town to move forward. Mayor Mulhollem expressed his desire for the Town to have an open line of communication with the Town of Clayton in case there is a need to move forward in the future.
- Mr. Chadwick mentioned the proposed State Land Use changes and Mr. Kress explained the requested changes. Mr. Kress shared that he is going to be meeting with the APA and Chad Meadows for updates regarding land use changes. Mr. Kress shared that the legislative changes have the potential to limit the municipality's authority. Discussion followed. Mr. Kress shared that several other towns are speaking out against the proposed changes. Council Member Bruton requested contact information for representatives. Mayor Mulhollem

led discussion for a resolution or Mayor Proclamation in regard to proposed State Land Use changes.

- Bryan Chadwick discussed and clarified the current benefits staff receive as it was brought to his attention there had been misinformation shared. Mr. Chadwick explained the current work environment as well as his desire for an improvement of staff morale. Mr. Chadwick presented his recommended benefits for the budget. He encouraged the Council to prepare themselves to make a decision on the recommendations soon as he will need the information to update the proposed budget. His recommendations included:
 - 6% contribution to 401K - 2% one time increase to current employees to offset the loss as contributions are currently at 8%.
 - Explained the difference between the 80/20 and 70/30 premium.

Discussion followed. Council Member Bruton and Council Member Buzzelli questioned the recommendation by Mr. Chadwick and proposed other potential changes that included reducing the contribution to 4-5% and whether to have an offset for the percentage change in contribution. Council Member Wilson, Council Member Jackson, Mayor Pro Tem Castleberry, and Mayor Mulhollem shared that they were in support of Mr. Chadwick's recommendations. Discussion followed. Council Member Buzzelli proposed a 2% merit-based increase based on meeting performance goals instead of a 2% blanket increase to all current staff. Discussion followed regarding the clear expectations for staff and who would set the performance goals in order for staff to receive the benefits. Parks and Recreation Director, Chris Allen, explained the complexity of merit-based increases and the need for staff goals to be clear and set in advance to ensure that they are able to meet expectations. Discussion followed.

- Bryan Chadwick mentioned that he is still waiting on the property tax reevaluation as well as the fire tax. Discussion followed.
- Special Meeting to be scheduled for Monday, April 28, 2025, at 6:30 pm in Jeffrey D. Barnes Council Chambers. Public comment period will be added to the agenda.

3 ADJOURNMENT:

- a) With no further business, Mayor Mullhollem adjourned the meeting at 8:14 pm.**
-
-

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Special Meeting - Minutes
Monday, April 28, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry

Council Member Bruton

Council Member Buzelli
Council Member Jackson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Town Administrator/Finance Director
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

Council Member Wilson

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mullhollem called the meeting to order at 6:31 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No changes or additions.

Moved by: Mayor Pro Tem Castleberry
Seconded by: Council Member Jackson

Motion to Approve Agenda

CARRIED UNANIMOUSLY

3. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

a) No Public Comments

4. OTHER BUSINESS:

5 - 6

a) Discussion of Opposing General Assembly Proposed Land Use Changes

Jason Kress provided a draft copy of Resolution Opposing Changes to Local Government Zoning Regulations, House Bill 765, and Related Bills in the NC General Assembly. He explained that he had presented the premise of this document at the last meeting as well as discussed it with Chad Meadows, who composed the Town's UDO. Mr. Kress asked Council to inform him of any changes they would like to make to the document. He shared that there are many other municipalities in North Carolina who are drafting similar resolutions, with urgency. The municipalities wish to submit the Resolutions to the General Assembly as a group, to show that municipalities across the State are not interested in the changes. Mr. Kress explained that the Resolution has similarities to another Resolution that the Council had passed a year prior. Mayor Mulhollem explained that there is a lot of growth happening around in the Town of Archer Lodge and by executing the Resolution the Town has the opportunity to guide and manage that growth.

Mayor Mulhollem read Resolution AL2025-04-28a. and called for a motion to approve.

Discussion followed. Council Member Jackson commented that Archer Lodge does not have the desire to be the next big town. He stated that, in his opinion, it is important for Archer Lodge to keep its small town feel and that he doesn't want this bill to be able to take that away from the Town. Mayor Pro Tem Castleberry also commented that when Archer Lodge decided to incorporate, they did so in order to control the Town's destiny and that they do not have the desire for someone else to be able to take over.

Mayor Pro Tem Castleberry thanked Mr. Kress for his hard work on this resolution.

Resolution AL2025-04-28a. Attached Below.

Moved by Council Member Buzzelli

Seconded by Council Member Jackson

Approved Resolution HAL2025-04-28a., as presented

CARRIED UNANIMOUSLY

[AL2025-04-28a Resolution Opposing Changes to Local Government Zoning Regulations](#)

7 - 10

b) Discussion of Approving The Hilb Group Benefits Proposal

Ms. Martin explained the rates and coverage as described in The Hilb Group Benefits Proposal. She explained that by using The Hilb Group for the employee's insurance, employees would be able to keep their current providers and the change would be minimal in terms of price in comparison to what is being paid for currently. She reminded Council that the loss of insurance by the NCLM (North Carolina League of Municipalities) was a sudden, unexpected change. Ms. Martin asked Council to consider voting for this decision in order for employees to have continuous coverage with no gaps she needs to get information to The Hilb Group in time for open enrollment. Current coverage provided by NCLM ends June 30th, 2025. Ms. Martin explained she was very impressed with what is offered in The Hilb Group Benefits Proposal as other proposals they received had much higher rates. Discussion followed. Council Member Bruton mentioned changing coverage for life insurance to less than the current coverage of 1.5 times salary. Ms. Martin shared that due to time restraints she initially requested rates that reflect the current coverages that the staff have. Ms. Martin explained that earlier in the week she requested more information from The Hilb Group and had yet to receive back any numbers. Discussion followed. Mayor Mulhollem called for a motion to approve The Hilb Group Benefits Proposal.

Moved by Council Member Jackson

Seconded Mayor Pro Tem Castleberry

Approved The Hilb Group Benefits Proposal.

CARRIED UNANIMOUSLY

[Hilb Group Proposed Benefits](#)

c) Discussion of Approving a Date to Hold a Public Hearing for a Special Use Permit Application

Mr. Kress advised Council of the need to hold a Public Hearing for a Special Use Permit Application. Due to there being an advertisement period, Mr. Kress requested that the public hearing be held on the week of May 19, 2025. Discussion followed. It was the consensus of the Council to hold the Public Hearing/Special Meeting on Monday, May 19, 2025, at 6:00 p.m.

d) Planning Discussions Continued

Mr. Chadwick passed out budget information that included the numbers requested by the Council. The information presented was strictly a draft, to show where budget discussions have led, and to receive input from Council. Ms. Batten assisted Mr. Chadwick by explaining portions of the hand out and providing clarification. Discussion followed.

- Including the topic of cost of elections that will be held in November 2025, bereavement, travel expenses, and legal advertising for government body category.
- Salaries, and how they are divided among the different departments depending on the employees' responsibilities.
- Updating the Town website as the last update was 7 years ago. Ms. Batten explained that the update would be going through the current website provider, and that the Town receives a heavily discounted price to update the website. Ms. Martin clarified that the website update would provide ease of access for citizens to town information as it has been brought to her attention on several occasions that citizens have been unable to find certain information on the website due to its design. Mayor Mulhollem mentioned that he had heard similar complaints. Chris Allen shared that in comparison to other municipalities in Johnston County the website appears to be outdated. Council Member Buzzelli posed questions about the necessity of the update. Mayor Pro Tem Castleberry shared that by putting an item in the budget, it gives the council the opportunity to later hear and vote on approving a change. He explained that without an item being in the proposed budget they would be unable to vote on it later as there would be no funds available for the item if they were to approve it.
- Mr. Chadwick shared that staff have yet to receive updated figures for property and liability insurance. He reminded Council that the Town still uses NCLM for these insurances.
- Discussion regarding Johnston County tax rates as they have not been set by the County. He informed Council that the information he is presenting is a place holder until they receive the numbers from the County.
- Mr. Chadwick informed Council that he has yet to receive information from the County regarding the Fire Department tax rate. He informed Council that the information he is presenting is a place holder until they receive the numbers from the County. Mayor Mulhollem shared that the Town is in a contract with the Fire Department because when the Town incorporated it nullified a portion of the Fire District. He shared that upon incorporation it was decided to add the Fire Department rate to the Town's taxes to ensure that the Town had fire service and they were not penalized for the incorporation of the Town.
- Expenses for safety, and the number that Mr. Chadwick was given by the Sheriff's Department. Council Member Jackson shared that in the future he hopes to see that the Town has its own police department.
- Mr. Chadwick discussed Animal Control Services that are being contracted with the Town of Clayton. He and Mr. Kress will be meeting on Tuesday with the Town of Clayton to discuss any updates and will provide to Council at the next meeting. Mr. Kress shared that he would provide updates at the next meeting and would share the March numbers for the animal control expenses. Mayor Mulhollem provided an explanation of how the animal control fees are charged on a per call basis. Discussion followed.

- Ms. Batten explained the expenses for Public Works regarding future consideration of installing street lights along the sidewalks on Buffalo Road for a downtown appearance and noted that the expenses are increasing. She shared that the streets are owned by NCDOT (North Carolina Department of Transportation), unless it's a private street. Ms. Batten informed everyone that the Town signage expenses are for MOSCA Banners, town limits signs, and consideration of installing a welcome sign. No discussion followed.
- Ms. Batten explained the expenses of the Planning & Zoning Department and added to Mr. Chadwick's discussion in a former meeting, as follows:
 - A portion of Staff salaries and benefits are included.
 - The Planning Board/Board of Adjustment's salaries are only per meeting with no changes.
 - FICA and Federal Government taxes are included.
 - Supplies were kept as listed on the budget in 2000, such as gasoline, vehicle maintenance, travel, training, meetings, and postage.
 - Contracted Services expenses are pending results of the General Assembly House Bills for Land Use Plan, ETJ and other services expenses in this department.
 - The Town software encompasses Finance, Human Resources, Planning & Zoning, Code Enforcement (if needed), Parks & Recreation, Employee Self-Service for employees enter hours worked and time out.
 - Code Enforcement expenses for violations.
 - The Dues and Subscriptions are for memberships for the Town Planner.
 - Workman's Comp, based on salary.
 - Documents are registered at the Johnston County Courthouse.
 - Equipment and furnishings in the Planning Department.
- Ms. Batten noted that the Parks & Recreation Department would be discussed at a later date due to it taking an extensive amount of time to cover.
- Ms. Batten discussed how the Debt Schedule originated and it's current status. Discussion followed.
- Ms. Batten discussed the transfers to the Reserve Funds. She shared that Mr. Chadwick recommended transferring \$50,000 from the General Fund into the Capital Reserve Fund, as well as another \$50,000 into the Public Safety Fund. Council Member Buzzelli questioned whether the Town would be able to get the General Fund back up the required minimum. Ms. Batten responded that it is hard to determine at this time. Discussion followed.

5. ADJOURNMENT:

a) With no further business, Mayor Mulhollem adjourned the meeting at 8:25 p.m.

Moved by Council Member Castleberry

Seconded by Council Member Jackson

Motion to Adjourn

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**TOWN OF ARCHER LODGE
RESOLUTION OPPOSING CHANGES TO
LOCAL GOVERNMENT ZONING REGULATIONS IN HOUSE BILL 765 AND
RELATED BILLS BY THE NORTH CAROLINA GENERAL ASSEMBLY**

WHEREAS, several bills, including House Bill 765, have been introduced in the 2025 session of the North Carolina General Assembly that changes many aspects of local planning and zoning and dramatically affect the ability of local governments to reflect the will of their citizenry; and

WHEREAS, planning and zoning options in all communities must adhere to state statute, they vary greatly, based on the desires of each community's residents and elected officials; and

WHEREAS, threats to the state's cities and towns can arise when developers try to convince legislators to strip local zoning requirements to meet their needs or allow them to opt out of local zoning altogether. Threats can also arise when advocates for increased housing demand that legislators support homogenization in zoning, arguing that all types of housing should be allowed everywhere; and

WHEREAS, hundreds of other small- to medium-sized towns in our state, including neighboring towns here in Johnston County, have worked diligently since our incorporation in 2009 to craft local zoning that is responsive to the needs of residents, builders, and developers, as well as local businesses; to this end, members of our Planning and Zoning Board, as well as periodic ad hoc resident committees tasked with recommending updates to the town's Future Land Use Plan, have worked with residents and our Town Council to periodically update local zoning; and

WHEREAS, Chapter 160D of the North Carolina General Statutes mandates comprehensive planning and zoning, and this Chapter of the Statutes would be severely eroded by passage of House Bill 765 by diminishing the input and trust of the citizens, including those who voluntarily serve on the Town's advisory boards; and

WHEREAS, we acknowledge the State of North Carolina's oversight over all state municipalities, respect the limitations and requirements established by current state statutes, and are grateful to state legislators for their dedication, and recognize their desire to address state-wide housing issues. At the same time, we believe that one-size-fits-all efforts that mandate significant changes to local zoning authority are misguided.

NOW, THEREFORE, BE IT RESOLVED, that the Town Council of the Town of Archer Lodge urges North Carolina General Assembly to leave planning and zoning decisions to the locally elected Boards and their citizens, and that the North Carolina General Assembly immediately terminate House Bill 765 and other related or similar bills which severely undermine the rights of the local citizens and their elected local government officials to make the zoning rules for their communities as they see fit. More specifically, the Town objects to the following:

- House Bill 765, now pending in the General Assembly will effectively mandate many planning and zoning decisions that are now made by local governments through the public participation process and will drastically change the process

and destroy the local community's authority to uphold public health, safety and welfare; and

- House Bill 876, which would impose unreasonable review times for development applications on administrative staff; and
- House Bill 913, which would impose undue penalties for local municipalities found to act unfairly or deceptive with respect to development approval; and
- House Bill 1009/Senate Bill 413, which seeks to eliminate the powers granted by General Statutes Chapter 160D for municipalities to exercise outside of the corporate limits, specifically extraterritorial areas; and
- Senate Bill 497, which would significantly alter the residential density allowed in any area zoned for residential use; and
- Senate Bill 688, which would expressly and broadly limit the authority of local governments to exercise planning, zoning, and development authority as authorized by General Statutes Chapter 160D; and
- Senate Bill 713, which would prohibit a local government from enacting, adopting, implementing, or enforcing an environmental or natural resources regulation with a more restrictive standard or limitation than those imposed by state or federal law, unless authorized by the General Assembly.

In this way, the Town of Archer Lodge also seeks to uphold the rights of all municipalities in North Carolina to self-determination within the parameters established by state statute and in collaboration with residents as well as state and county leaders.

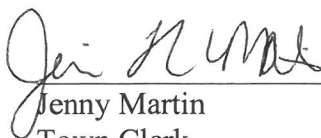
DULY ADOPTED ON THIS 28th DAY OF APRIL 2025, WHILE IN A SPECIAL MEETING.


_____ (SEAL)

Matthew B. Mulhollem
Mayor



ATTEST:


_____ (SEAL)
Jenny Martin
Town Clerk



Municipal Benefits Alliance Plan Options

Plans Selected	Dental Option 1	Dental Option 2	Dental Option 3
Coinsurance			
Preventive	100%	100%	100%*
Basic	50%	80%*	80%*
Major	25%	50%*	80%*
Child Orthodontia	50%	50%*	50%*
Annual Maximum	\$1,000	\$1,000	\$1,500
Child Orthodontia Maximum	\$1,000	\$1,000	\$1,000
Deductible			
Employee	\$50	\$50	\$50
Family	\$100	\$100	\$100
Rates	Without Ortho	Without Ortho	Without Ortho
Employee Only	\$19.26	\$31.03	\$40.66
Employee + Spouse	\$37.45	\$62.06	\$82.39
Employee + Children	\$42.80	\$65.27	\$85.60
Family	\$46.01	\$81.32	\$108.07
	With Ortho	With Ortho	With Ortho
Employee Only	\$19.26	\$31.03	\$40.66
Employee + Spouse	\$37.45	\$62.06	\$82.39
Employee + Children	\$42.80	\$65.27	\$85.60
Family	\$46.01	\$81.32	\$108.07

** Orthodontia benefits apply to dependents age 25 years old & younger.

	CURRENT	CURRENT	CURRENT	New
Plan	Exam Only	Signature Premium	Signature Premium Plus	Signature
Frequency	12	12/12/12	12/12/12	12/12/12
service, calendar, plan	Service Plan	Service Plan	Service Plan	Service Plan
Copay(s)	\$10	\$10/\$20	\$10/\$20	\$0
Retinal Screening	No more than a \$39 copay	No more than a \$39	No more than a \$39 copay	\$25
Retail Frame Allowance	NA	\$120	\$160	\$200
Featured Frame Brand Allowance		\$140	\$180	\$220
Elective Contact Lenses	NA	\$120	\$160	\$200
Contact Lens Examination	15% Discount	15% Discount	15% Discount	\$60
LightCare - ready-made non-prescription sunglasses or ready-made non-prescription blue light filtering glasses	NA	NA	NA	\$200
Covered Lens Options	NA	NA	Anti Reflective, Standard Premium and Custom Progressives, Poly for all	Anti Reflective, Standard Premium and Custom Progressives, Poly for all
Essential Medical Eye Care Copay	\$20	\$20	\$20	\$20
OOON schedule				
Exam	\$40	\$40	\$40	\$40
Single Vision	NA	\$46	\$46	\$46
Bifocal/Progressive	NA	\$65	\$65	\$65
Trifocal	NA	\$84	\$84	\$84
Frame	NA	\$45	\$45	\$45
Contact Lens	NA	\$105	\$105	\$105
NCL	NA	\$210	\$210	\$210
Age limits and method	0-18 and 18-26	0-18 and 18-26	0-18 and 18-26	0-18 and 18-26
	Date of Birth	Date of Birth	Date of Birth	Date of Birth
Participating retail chains	Yes	Yes	Yes	Yes
Walmart	Yes	Yes	Yes	Yes
RFA	NA	\$65	\$85	\$110
ECL	NA	\$120	\$160	\$200
Costco	Yes	Yes	Yes	Yes
RFA	NA	\$65	\$85	\$110
ECL	NA	\$120	\$160	\$200
RATES—Fully Insured	Renewal Rates	Renewal Rates	Renewal Rates	Renewal Rates
Member Only	\$1.02	\$5.65	\$14.24	\$18.11
Member + Spouse	\$2.05	\$11.29	\$28.48	\$36.23
Member + Child/ren	\$2.19	\$12.08	\$30.47	\$38.76
Member + Family	\$3.50	\$19.31	\$48.70	\$61.95



Term Life with Accidental Death & Dismemberment (AD&D) Insurance

How does it work?

You keep coverage for a set period of time, or "term." If you die during that term, the money can help your family pay for basic living expenses, final arrangements, tuition and more. AD&D Insurance is also available, which can pay a benefit if you survive an accident but have certain serious injuries. It can pay an additional amount if you die from a covered accident.

Why Choose Unum?

Your employer pays the cost of your coverage.

What else is included?

A "Living" Benefit

If you are diagnosed with a terminal illness with less than 12 months to live, you can request 50% of your life insurance benefit (up to \$750,000) while you are still living. This amount will be taken out of the death benefit and may be taxable.

Who can get Term Life coverage?

If you are actively at work at least 30 hours per week, you can receive coverage for:

You: Life and AD&D coverage varies based on the plan design chosen by your employer.

Your dependents: Varies based on the plan design chosen by your employer. You must make contributions for your dependent coverage. The amount of Life insurance for your dependents will not be more than 100% of your amount of Life insurance.

One policy covers all of your children until their 19th birthday (26 if a full-time student at an accredited school).

Who can get Accidental Death & Dismemberment (AD&D) coverage?

You: Varies based on the plan design chosen by your

No medical underwriting is required for AD&D coverage.

Life (Term) Insurance

*Rates

Employee Life & AD&D Insurance (per 1,000)	0.32
Retiree Life (per 1,000)	0.32
Dependent Life Plans	
Plan A: \$2,000	0.88
Plan B: \$2,500	1.06
Plan C: \$5,000	2.00
Plan D: \$10,000	4.10

*(per employee per month)



Municipal Insurance Trust of North Carolina

Short Term Disability Insurance



How does it work?

If a covered illness or injury keeps you from working, this employer-provided Short Term Disability Insurance replaces part of your income while you recover. As long as you remain disabled, you can receive payments for up to 26 weeks, subject to the elimination period.

You're generally considered disabled if you're unable to do important parts of your job — and your income suffers as a result.

Why is this coverage so valuable?

Your employer is paying the cost of this coverage. You can use the benefits however you choose. It can help you pay for your rent or mortgage, groceries, out-of-pocket medical expenses and more.

How much coverage can I get?

You*	<p>You are eligible for coverage if you are an active employee in the United States working a minimum of 30 hours per week.</p> <p>Cover 60% of your weekly income, up to a maximum benefit of \$750 per week.</p> <p>*See the Legal Disclosures for more information.</p>
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The weekly benefit may be reduced or offset by other sources of income. The IRS may require you to pay taxes on certain benefit payments. See your tax advisor for details.

If you don't enroll now but decide to apply later, you may have to answer health questions to receive coverage.

Elimination period (EP)

This is the number of days that must pass between your first day of a covered disability and the day you can begin to accrue your disability benefits.

Your benefits would begin after you become disabled for 7 days.

Benefit duration (BD)

The maximum number of weeks you can receive benefits while you're disabled. You have a 26 week benefit duration.

Short Term Disability Insurance pays you a weekly benefit if you have a covered disability that keeps you from working.

What else is included?

Survivor benefit

If you die after you've been receiving Short Term Disability benefits for at least 15 days, your family could get a payment of \$5,000 or 3 times your weekly benefit amount, whichever is less.

Disability (employee only)

Rates (monthly)

Short Term Disability Rate (Per \$10)	0.46
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**Special Meeting - Minutes
Monday, May 19, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Buzzelli
Council Member Bruton
Council Member Jackson

STAFF PRESENT:

Kim P. Batten, Assistant Administrator/Finance Director
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

Council Member Wilson

STAFF ABSENT:

Bryan Chadwick, Town Administrator

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mullhollem called the meeting to order at 6:10 p.m in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. QUASI-JUDICIAL PUBLIC HEARING:

10 - 24

a) Discussion and Consideration of a Special Use Permit Application submitted by Mark Shiramitaro to build a detached garage, on a 5.6 acre lot at 180 Loop Rd, Archer Lodge, NC. This property is owned by Aubeca LLC and is referenced as Johnston County parcel tag id number 16J03076I.

Conduct of Quasi-Judicial Public Hearing:

1. Town Attorney - Swear in Witnesses (including staff, who intend to present evidence)
2. Mayor - Call Case as Stated on the Agenda
3. If applicant is to be represented by anyone other than a licensed attorney, the applicant shall request the consent of the Town Council.
4. Members of the Town Council to Disclose the Following:
 - Any Site Visits
 - Ex Parte Communications
 - Specialize Knowledge They Have Relevant to the Case
 - Fixed Opinion That is Not Susceptible to Change Based on What They Learn
 - Conflict of Interest

- Financial Interest; and
- Any Other Information Relevant to Determining Whether a Conflict of Interest Exists

**** Town Council to Vote on Recusal of Member if Any Conflict Exists. Note: The Applicant or Other Affected Persons May Present Any Objections Regarding a Member's Participation. ****

5. Mayor - Open the Public Hearing
6. Staff Report
7. All Parties Represented by Attorneys, the Applicant, Followed by Any Opposing Party, May Present a Brief Opening Statement
8. Applicant - Present Arguments and Evidence in Support of the Application
9. Persons Opposed to Granting the Application Shall Present Arguments and Evidence Against
10. Opportunity for Cross-Examination
11. After All Evidence Has Been Presented, the Mayor May Ask the Parties if There is Additional Relevant Information that Has Not Been Presented that Would Make a Continuance in Order
12. The Mayor will Entertain Objections and Rule on the Admissibility of the Evidence or Exhibit
13. The Mayor - Close the Public Hearing Unless the Hearing Has Been Continued to the Next Scheduled Quasi-Judicial Hearing or to a Publicly Stated Date, Time, and Location
14. The Mayor - Calls for a Vote on Each of the Findings of Fact/Conclusions for the Special Use Permit
 - Must Receive a Simple Majority Vote of the Town Council for the Application to be Approved.
 - The Town Council May Attach Conditions of Approval in Accordance with Existing State Law and Town Code
15. The Mayor - Calls for a Vote on the Special Use Permit
 - Must Receive a Simple Majority Vote of the Town Council for the Application to be Approved
 - The Town Council May Attach Conditions of Approval in Accordance with Existing State Law and Town Code
16. The Mayor - Calls for a Vote on the Site Plan

Special Use Permit Application submitted by Mark Shiramitaro to build a detached garage, on a 5.6 acre lot at 180 Loop Rd, Archer Lodge, NC. This property is owned by Aubeca LLC and is referenced as Johnston County parcel tag id number 16J030761.

Quasi-Judicial Public Hearing:

1. Town Attorney - Swear in Witnesses (including staff, who intend to present evidence)

Town Attorney, Marcus Burrell requested anyone in attendance who plans to speak in regards to the permit as a member of the public or a member of the staff to step forward to be sworn in. Attorney Burrell proceeded to swear in/affirm all participants.

2. Mayor - Call Case as Stated on the Agenda

Mayor Mulhollem called case as Stated on Agenda.

3. If applicant is to be represented by anyone other than a licensed attorney, the applicant shall request the consent of the Town Council.

Council was not required to provide consent as Mark Shiramitaro informed council that he would be representing himself in this matter.

4. Members of the Town Council to Disclose the Following:

- Any Site Visits
- Ex Parte Communications
- Specialize Knowledge They Have Relevant to the Case
- Fixed Opinion That is Not Susceptible to Change Based on What

They Learn

- Conflict of Interest
- Financial Interest; and
- Any Other Information Relevant to Determining Whether a Conflict of Interest Exists

** Town Council to Vote on Recusal of Member if Any Conflict Exists.

Note: The Applicant or Other Affected Persons May Present Any Objections Regarding a Member's Participation. **

Council Member Buzzelli disclosed that he knows the owner of the neighboring property and that he has been to the home of the petitioner; however, he has not visited the property that is requesting the permit. Mayor Mulhollem asked Attorney Burrell if he considered Council Member Buzzelli's disclosure as a conflict of interest. Attorney Burrell asked Council Member Buzzelli if his relationship with the owner of the neighboring property would prevent him from making an impartial decision on this matter. Council Member Buzzelli shared that his relationship with the owner of the neighboring property had no bearing on his ability to make an impartial decision. With that being said Attorney Burrell left the decision up to the remaining council members if they believe Council Member Buzzelli to have a conflict of interest that should hinder him from hearing the case. Hearing none, Attorney Burrell recommended that the council proceed.

5. Mayor - Open the Public Hearing

Mayor Mulhollem: Do I have a motion to open the public hearing?

Council Member Jackson: So moved.

Mayor Mulhollem: I have a motion. Is there a second?

Mayor Pro-Tem Castleberry: Second.

Mayor Mulhollem: I have a motion and a second, is there any discussion?

Mayor Mulhollem: All in favor?

Mayor Mulhollem: Motion carries. Alright so, as the hearing is now open, item six. Staff report, Mr. Jason?

6. Staff Report

Jason Kress: Good evening, council! Um, I will forego some of the information here if there is anything you want to go back to. Site information the Mayor has reviewed already. The reason for the request, Mr. Shiramitaro is seeking an exception to the UDO standard that restricts the maximum allowable size for an accessory structure. Accessory structure standards limit the maximum size to 100 percent of the closed square foot of the primary dwelling when the lot is five acres or larger. That was a recent change that was approved by you all. For this scenario the primary dwelling is 1,929 square feet. The maximum allowed size for an accessory structure would be 1,929 square feet. The applicant is requesting a 5,000 square foot garage/storage building located at the back of the property. The UDO standards in question listed out here from the UDO, except on lots of five acres in area or greater the cumulative square footage of all accessory structures in use on a lot should not exceed the total square footage of the primary structure or structures. We will go to section two, staff analysis. Staff have made the determination that the applicant seeks a special use permit since it would be challenging for the applicant to meet the requirements of a variance request and meet the burden of proof for the findings of fact. The location of the property is at 180 Loop Road. It is zoned agricultural residential, and is surrounded immediately by similarly zoned properties. The Cooper Farms and Archer's Pointe subdivisions are located to the east and north of 180 Loop Road respectively and the property is located within the water supply watershed. There is a map in your staff report if you would like to get an image of where this is at we have it shown already. For impact, it is the determination of staff that the proposed construction would have minimal impact on the land and surrounding properties. The building would not be directly visible off from the public right-of-way. The built upon area of the property would be impacted by the new construction but not significantly due to the size of the property. The property would be considered at the strictest level for the water supply watershed

district, 24 percent of the impervious surface which calculates to approximately 58,544 square feet. The requested building is only 5,000 square feet so that would fit in there. The building size, the 5,000 square foot garage would be approximately 2.6 times the size of the principle structure. For A/R zoned lots that are 5 acres in size or larger town ordinances were recently amended to allow accessory structures that are up to 100 percent of the size of the principle structure, but not larger. The maximum height allowed in the A/R district is 40 feet. So, just typical standards to consider for special use permits. The project will not materially endanger public health or safety. Staff determined that was true. The project will not substantially injure the value of adjoining property and if so, it is a public necessity. That was true as well. This project will be in harmony or compatible with its neighbors and generally consistent with the comprehensive plan. That was confirmed. The project will meet all required conditions and specifications as listed. That was confirmed also. Staff's recommendations. Staff's preliminary conclusions are an application of facts, observations, and circumstances associated with this special use hearing and are based on the information available to staff as of the preparation date of this report. This information includes the application and exhibits prepared by the applicant, meetings between staff and the applicant, and staff's observations, data, and analysis. Taking into consideration the facts and potential impacts of the request, Staff recommends approval of the Special Use Permit. If that is everything, let me know if you have any questions.

Attorney Burrell: That's fine.

Council Member Bruton: I just have one question, Jason for something that was included in the package. It's kind of hard to pick up but it looks like there is already several structures back there. Is that true and how many are there?

Jason Kress: Mr. Shiramitaro, can you please help answer that?

Mr. Shiramitaro: There are none anymore. They were dilapidated and potentially dangerous and made of tin and were taken down due to a windstorm.

Council Member Bruton: So the only structure on this is your house?

Jason Kress: I might add that the GIS photos are from 2021 so they are not always up to date. That is a good question.

Mr. Shiramitaro: Also, what look like structures up near the trees are actually covers for cellars. Back there there are no structures.

Mayor Mullhollem: Okay, any other member of council have any further questions on the report? Alright hearing on we're going to move on to item number seven.

Finding of Fact:

Finding of Fact# 1

Finding of Fact# 2

Finding of Fact# 3

Finding of Fact# 4

Staff comments for Findings:

1.

7. All Parties Represented by Attorneys, the Applicant, Followed by Any Opposing Party, May Present a Brief Opening Statement

Mayor Mulhollem: All Parties Represented by Attorneys, the Applicant, Followed by Any Opposing Party, May Present a Brief Opening

Statement. Anybody want to make an opening statement?

Mr. Shiramitaro: I am not sure that I need to but I can make one if you would like.

Mayor Mulhollem: Alright, are there any opposed that would like to make a brief opening statement? Okay.

8. Applicant - Present Arguments and Evidence in Support of the Application

Mayor Mulhollem: Alright, item number eight. Applicant - Present Arguments and Evidence in Support of the Application.

Mr. Shiramitaro: Good Evening! Thank you all for your time I appreciate you for having this special meeting. Um, we moved to North Carolina about six years ago. We love this area. We settled down in this area for all the reasons and all the good work that you are doing. We really like that Archer Lodge has the vision to be able to see the past but still embrace the future, technology, and the things that are moving the state forward. We bought the 5.6 acres basically to use for a lot of different reasons but a part of it was that we have vehicles, cars essentially. I have a lift at my house in garage but it gets pretty complicated to work on and have storage of product. So we decided to expand into something that is a lot bigger and that can fit our needs. Another problem is that the out buildings that we thought were there were in such bad shape that we really could not use them. So we are looking for approval for a mixed use space of storage and some working that would mostly be just like the garage that you have at your house.

Mayor Mullhollem: Alright, thank you.

Mayor Mullhollem: Item number nine, Persons Opposed to Granting the Application Shall Present Arguments and Evidence Against.

Attorney Burrell: You will need to ask if any members of council have any questions.

Mayor Mullhollem: Okay sorry about that. Do any member of council have any questions of the applicant.

Council Member Bruton: So there is no business that is going to be run out of this building, is it all totally personal?

Mr. Shiramitaro: I do business over there quite a bit but it is not a manufacturing kind of business. We are in a lot of consulting. Most of what I do is over the phone and drawings and programming.

Council Member Bruton: So it will be taking place in this structure?

Mr. Shiramitaro: At worst there might be some storage of some equipment but not manufacturing.

Mayor Pro-Tem Castleberry: Will there be anything sitting outside around the building that you could see from the road?

Mr. Shiramitaro: Absolutely not, sir.

Mayor Pro-Tem Castleberry: Would it fall under anything from that?

Mr. Shiramitaro: It is not going to be visible from the road so it would be hard to say so.

Jason Kress: It is really far back.

Mr. Shiramitaro: With the tree line and where it is we placed it to make sure that there isn't any visibility from neighbors or from the road. To kind of really keep it encapsulated.

Council Member Bruton: So is it enclosed or is it open air?

Mr. Shiramitaro: Enclosed. We chose colors for the building to best blend into the environment back there. So it's not going to be like bright red or flashy anything.

Attorney Burrell: And Jason, just for the benefit of the council. I know the site plan shows a set back of I think 46.6 from the closest corner. That meets all town required set backs from property lines.

Jason Kress: By five times over. The required setbacks for A/R is 10 feet. It's not a concern considering the way that it is situated it's more central than any lines.

Council Member Bruton: Why is it described as a possible 50 foot ***inaudible* 0:29:25** ? Is that going to be something that would be provided or that could be provided?

Jason Kress: I'm not sure that is something from the surveyor. I mean

its not something, I think its just something that is on the lot there. But I don't think its, I think it's further than 50 feet away from it as it is. So I think they try to account for that in case it is something that we have.
Council Member Bruton: Just calling it possible is what caught my eye.
Mr. Shiramitaro: As I understand it from they guy that made it, it was on a previous plot plan so he brought it over. So he put a qualifier on it.
Council Member Buzzelli: So do you have plans on working on other people's vehicles for pay in that?
Mr. Shiramitaro: I mean not that I wouldn't help a friend. But other than that I do not go into the business of working on cars.
Council Member Buzzelli: Yeah, that's what I am talking about.
Mayor Mulhollem: Any additional questions?
Michael Edwards: I would like to speak in support.
Mayor Mulhollem: Okay, go ahead.
Attorney Burrell: Now when you step up to the mic please state your name and your address. We are recording it for records.
Michael Edwards: My name is Michael Edwards. I live at 150 Loop Road directly beside and in the adjoining lot. I moved here about 10 years ago and we have not had no issues what so ever. We do own the property directly beside this property. We are the only residents there I think there may be one on the other side. On the back there are no residents. Mark is a great neighbor. Mark is a very modest man. Like any good citizen would do after Mark moved in, he did his research and found out a lot of things. Mr. Shiramitaro is world renowned, Mark is too modest of a man to tell y'all that. He is an engineer. He had a big part in the development of the Arthur Ash stadium and is a genius and we should be proud to have him as a part of our neighborhood and it shouldn't be any problem for him to build whatsoever.
Mayor Mulhollem: Thank you, sir.

9. Persons Opposed to Granting the Application Shall Present Arguments and Evidence Against

Mayor Mulhollem: Alright, moving on to item number 9. Persons Opposed to Granting the Application Shall Present Arguments and Evidence Against. Are there any? Are there any of those folks that are present tonight that are opposed?
Mayor Mulhollem: Alright.

10. Opportunity for Cross-Examination

Mayor Mulhollem: Seeing and hearing none, we will move on to item number 10. Opportunity for Cross-Examination. I assume that we don't have a need for cross-examination is that correct?
Attorney Burrell: That is correct.

11. After All Evidence Has Been Presented, the Mayor May Ask the Parties if There is Additional Relevant Information that Has Not Been Presented that Would Make a Continuance in Order

Mayor Mulhollem: Item number 11, After All Evidence Has Been Presented, the Mayor May Ask the Parties if There is Additional Relevant Information that Has Not Been Presented that Would Make a Continuance in Order. Alright, so Mr. Edwards, in addition to what you just spoke I assume that you or the applicant if you have any additional relevant information. If not, we will move along.
Michael Edwards: I would just like to say that he has been here the last several years and is not the average, every day Archer Lodge resident. He is well known world wide, so. What I'm trying tot tell you is that he's too modest to tell you that. This guy is like the architect.
Mayor Mulhollem: Thank you.

12. The Mayor will Entertain Objections and Rule on the Admissibility of the Evidence or Exhibit

Mayor Mulhollem: Item 12. It says, The Mayor will Entertain Objections and Rule on the Admissibility of the Evidence or Exhibit. Um, Mr. Attorney, I don't see any reason.
Attorney Burrell: Mr. Mayor this kind of falls under the same thing as the cross-examination. Since no one opposed, there is not any objections.

Mayor Mulhollem: That's what I just wanted to verify with you.

13. The Mayor - Close the Public Hearing Unless the Hearing Has Been Continued to the Next Scheduled Quasi-Judicial Hearing or to a Publicly Stated Date, Time, and Location

Mayor Mulhollem: Okay, item 13. Council, I need a vote to close the public hearing. So, do I have a motion to and that is unless the hearing has been continued to the next scheduled quasi-judicial, which it has not. So do I have a motion to close the public hearing.

Council Member Jackson: So moved.

Mayor Mulhollem: I have a motion is there a second?

Mayor Pro-Tem Castleberry: Second.

Mayor Mulhollem: I have a motion and a second. Is there any discussion? All in favor? Okay, Public hearing is now closed.

14. The Mayor - Calls for a Vote on Each of the Findings of Fact/Conclusions for the Special Use Permit

- **Must Receive a Simple Majority Vote of the Town Council for the Application to be Approved.**
- **The Town Council May Attach Conditions of Approval in Accordance with Existing State Law and Town Code**

Mayor Mulhollem read the following Findings of Fact:

- **Finding A. Will not materially endanger the public health, safety if located where proposed.**

Applicant's Response: This building will be well off of Loop Road and has been placed in a location that will minimize the visual impact.

Approved Finding A.

Moved by Council Member Buzzelli,
Seconded by Council Member Jackson.
CARRIED UNANIMOUSLY.

- **Finding B: Complies with all standards, conditions, and specifications in the UDO, including Article 5 Use Regulations, and Article 6, Development Standards.**

Applicant's Response: We have contracted suppliers that will adhere to very standard to perform above and beyond safety standards. We will monitor and made any adjustments required as the project progresses.

Approved Finding B.

Moved by Council Member Jackson,
Seconded by Council Member Buzzelli.
Discussion followed.
CARRIED UNANIMOUSLY.

- **Finding C: Will not substantially injure the value of the the abutting land, or the special use is a public necessity.**

Applicant's Response: We have planned the location and layout of this building to insure that it will not impact any abutting land.

Approved Finding C.

Moved by Council Member Jackson,
Seconded by Council Member Buzzelli.
CARRIED UNANIMOUSLY.

- **Finding D: Will be in harmony with the area in which it is to be located.**

Applicant's Response: This building will be placed in an appropriate location and we are using colors to ensure that this building blends into the existing landscapes to the best of our

abilities.

Approved Finding D.

Moved by Council Member Jackson,
Seconded by Council Member Buzzelli.
CARRIED 3 to 1.

- **Finding E: It is in general conformity with the Town's adopted policy guidance.**

Applicant's Response: We chose Archer Lodge area because we are aligned with and will provide a building that adheres to the Town's policies and guidance.

Approved Finding E.

Moved by Council Member Jackson,
Seconded by Council Member Buzzelli.
CARRIED 3 to 1.

- **Finding F: Will not exceed the Town's ability to provide adequate public facilities (fire and rescue, utilities, etc.).**

Applicant's Response: This building will be of an appropriate size to fit well within the town's public facilities.

Approved Finding F.

Moved by Council Member Jackson,
Seconded by Council Member Buzzelli.
Discussion followed.
CARRIED UNANIMOUSLY.

15. The Mayor - Calls for a Vote on the Special Use Permit

- **Must Receive a Simple Majority Vote of the Town Council for the Application to be Approved**
- **The Town Council May Attach Conditions of Approval in Accordance with Existing State Law and Town Code**

Mayor Mulhollem asked council if they would like to attach any conditions prior to voting for approval. Hearing none, he asked if there was a motion for the approval of the application.

Approved Special Use Permit

Moved by Council Member Jackson,
Seconded by Mayor Pro-Tem Castleberry.
Discussion followed.
CARRIED 3 to 1.

16. The Mayor - Calls for a Vote on the Site Plan

Mayor Mulhollem asked if there was a motion for the approval of the site plan as presented.

Approved Site Plan

Moved by Council Member Jackson,
Seconded by Council Member Buzzelli.
CARRIED UNANIMOUSLY.

[Documentation for Special Use Hearing](#)

3. ADJOURNMENT:

- a) **With no further business, Mayor Mulhollem called for a motion to**

adjourn.

Moved by: Council Member Jackson

Seconded by: Council Member Buzzelli

Approved to Adjourn the Meeting at 6:48 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk

**TOWN OF ARCHER LODGE
PLANNING AND ZONING DEPARTMENT
STAFF REPORT
SPECIAL USE PERMIT SUP-25-05.A
MAY 19TH, 2025**

- 1. OVERVIEW**
- 2. STAFF ANALYSIS**
- 3. STAFF RECOMMENDATION**
- 4. ATTACHMENTS**

1. OVERVIEW

1.1. Site Information

Location: 180 Loop Road, Archer Lodge, NC 27527

Parcel id: 16J03076I

Owner: Aubeca, LLC / Mark Sharamitaro

Applicant: Mark Sharamitaro

Acreage: 5.6 acres

Current Zoning: Agricultural-Residential (AR)

1.2. Reason for Request

The applicant, Mr. Sharamitaro, is seeking an exception to the UDO standard that restricts the maximum allowable size for an accessory structure. Accessory structure standards limit the maximum size to 100% of the total square footage of the primary dwelling when the lot is 5 acres or larger. For this scenario, the primary dwelling is 1929 sqft and the maximum size allowed for the accessory structure would be 1929 sqft. The applicant is requesting a 5000 sqft garage/storage building located at the back of the property.

1.3. UDO Standards

Article 5. – Division 4. – Sec. 30-5403 (6)

(6) Maximum size.

- a. Except on lots of five acres in area or greater, the cumulative total square footage of all accessory uses or structures on a lot shall not exceed more than 50 percent of the total square footage of the principal structure or structures on the same lot.
- b. In the case of an open air principal use, the cumulative total square footage of all accessory uses or structures on a lot shall not exceed more than 40 percent of the total square footage of the area devoted to the principal use.
- c. In the case of lots of five acres or more in area, the cumulative square footage of all accessory uses or accessory structures may exceed 50 percent of the total square footage of the principal structure(s) but shall not exceed 100 percent of the total square footage of the principle structure(s) on the lot.

2. STAFF ANALYSIS

2.1. Staff Guidance

Staff made the determination that the applicant seeks a Special Use Permit since it would be challenging for the applicant to meet the requirements of a Variance request and meet the burden of proof for the Findings of Fact.

2.2. Location

The property at 180 Loop Road is zoned as Agricultural-Residential (AR) and is surrounded immediately by similarly zoned properties. The Cooper Farms and Archer's Pointe subdivisions are located to the East and North of 180 Loop Road, respectively. The property is located within a Watersupply Watershed.

2.2. Impact

It is the determination of staff that the proposed construction would have a minimal impact on the land and surrounding properties. The building would not be directly visible from the public right-of-way. The built-upon area of the property would be impacted by the new construction, but not significantly due to the size of the property. The property would be considered at the strictest level for the Watersupply Watershed District, 24% of the impervious surface, which calculates to approximately 58,544 square feet. The requested building would be 5000 sqft.

2.3. Building Size

The 5000 sqft building would be approximately 2.6x (times) the size of the principal structure. For AR zoned lots that are 5 acres or more, Town Ordinances were recently amended to allow accessory structures that are up to 100% the size of the principal structure, but not larger. The maximum height allowed in the AR district is 40 ft.

2.4. Special Use Standards

2.4.1. This project does not materially endanger public health or safety.

Staff determination: Confirmed

2.4.2. This project will not substantially injure the value of adjoining property or, if so, is a public necessity.

Staff determination: Confirmed

2.4.3. This project will be in harmony or compatible with its neighbors and generally consistent with the comprehensive plan.

Staff determination: Confirmed

2.4.4. This project will meet all required conditions and specifications.

Staff determination: Confirmed

3. STAFF RECOMMENDATION

Staff's preliminary conclusions are an application of facts, observations, and circumstances associated with this special use hearing and are based on the information available to staff as of the preparation date of this report. This information includes the application and exhibits prepared by the applicant, meetings between staff and the applicant, and staff's observations, data, and analysis.

Taking into consideration the facts and potential impacts of the request, Staff recommends approval of the Special Use Permit.

4. ATTACHMENTS

- 4.1. Special Use Permit Application
- 4.2. GIS Map
- 4.3. Orthographic Map
- 4.4. Site Plan
- 4.5. Zoning Permit Application
- 4.6. Johnston County Septic Permit



Office Use Only:

Permit #: _____
Fee: \$ _____; Receipt No. _____
Payment Method: Ck# _____
Cash: _____; Other: _____ Pay Date: _____
Application Rec.: _____

Town of Archer Lodge

Special Use Permit Application

1. General Information (Please Type or Print)

Property Owner: AuBeCa LLC.
Address: 244 Josiah Dr. City: Clayton State: NC Zip: 27527
Telephone Number: (919) 920-2032 Fax Number: _____
E-mail Address: Mark@Sharamitaro.com

Applicant/Contact: Mark Sharamitaro
Address: 244 Josiah Dr City: Clayton State: NC Zip: 27527
Telephone Number: _____ Fax Number: _____
E-mail Address: Mark@Sharamitaro.com

2. Property Information:

Property Address (if known): 180 Loop Rd.
Johnston Co. Tax Map: Plat Book 59 page 146 Lot: 7&8 Zoning District: Archer Lodge
Site Access Off Road: _____ Lot Acreage: 5.9
Status of Lot: Existing: 5.9 Proposed: 5.9
Protected Watershed: No: X Yes: _____, If yes, proposed impervious surface area: _____;
Existing Impervious Surface: No

3. Utilities (Existing or Proposed – Check All That Apply):

Public Sewer: (a) Existing, (b) Proposed
Public Water: (a) Existing, (b) Proposed
Well: (a) Existing, (b) Proposed
Septic: (a) Existing, (b) Proposed
Building Floor Area (sq. ft.) 5000 Max. Bldg./Structure Height: 16 ft.

4. Describe Nature of Request (Type of Building, Land Use, Hours of Operation, etc.):

Additional storage space. Steel building

5. Submittal Information:

The items listed below are needed to verify compliance with the Town of Archer Lodge, Code of Ordinances, NC State/Local laws and must accompany the special use permit application. Please note that additional information may be needed upon review of the submitted material.

- A. A copy of the most recent deed to the property for which the permit is requested. A copy can be obtained from the Johnston County Register of Deeds Office.
- B. A copy of the property survey plat.
- C. If leasehold property, provide copy of lease and, if applicable, access easement to leasehold property.
- D. All site plans shall be prepared by a NC registered engineer, architect, or professional land surveyor, sealed by the same and shall include information as stated in Unified Development Ordinance (UDO), Article 11, Division 5. UDO provisions may be found at the following link: [Archer Lodge Unified Development Ordinance - Effective: June 7, 2021](#)
- E. Other: _____
- F. Fee: \$750

6. Special Use Permits:

The Archer Lodge Town Council does not have unlimited discretion in deciding whether to grant a special use permit. NC State Laws will be adhered to in the conduct of quasi-judicial public hearing. Moreover, findings of fact will be made in accordance with ordinance provisions referenced in Chapter 30, Article 3, Division 3, Section 30-3318 of the Archer Lodge Code of Ordinances.

Additionally, where applicable, development standards for specific uses will also be considered and evaluated for ordinance compliance.

Please note: Under each indicate the facts you, the applicant, intend to show and statements that you intend to make to convince the Town Council that it can properly reach the required findings of fact listed below (attach additional sheets if needed):

A. Will not materially endanger the public health, safety if located where proposed;

This building will be well off of Loop Road and has been placed in a location that will minimize the visual impact.

B. Complies with all standards, conditions, and specifications in the UDO, including Article 5 Use Regulations, and Article 6, Development Standards;

we have contracted suppliers that will adhere to every Standard and perform above and beyond all safety standards.
We will monitor and make any adjustments required as the project progresses.

C. Will not substantially injure the value of the abutting land, or the special use is a public necessity;

We have planned the location and layout of this building to insure that it will not impact any abutting land.

D. Will be in harmony with the area in which it is to be located;

The building will be places in an appropriate location and we are using colors to ensure that this building blends into the existing landscapes to the best of our abilities.

E. Is in general conformity with the Town's adopted policy guidance; and

We chose Archer Lodge area because we are aligned with and will provide a building that adheres t the Town's policies and guidance.

F. Will not exceed the Town's ability to provide adequate public facilities (fire and rescue, utilities, etc.).

This building will be of an appropriate size to fit well within the towns public facilities.

Note: If the Town Council approves a special use permit, it may, as part of the terms of such approval, impose any additional reasonable conditions and safeguards as may be necessary to ensure that the criteria for the granting of such a permit will be followed per Section 30-3206, Conditions of Approval. The Town Council may not impose conditions for which the Town does not have statutory authority, including taxes, impact fees, building elements for one-two family dwellings and driveway improvements in excess of those allowed by 160D -170 (b) of the North Carolina General Statutes.

7. Signatures and Acknowledgment:

The undersigned hereby certify that the application material is complete and accurate.

FURTHERMORE, the undersign hereby authorizes the Town of Archer Lodge, NC Town Planner or designated representatives to enter upon the above referenced property for the purpose of inspecting and determining/verifying compliance with the Town’s ordinance provisions.

Mark Sharamitaro

Digitally signed by Mark Sharamitaro
Date: 2025.04.22 16:52:14 -04'00'

4/22/2025

Applicant’s Signature

Date

Mark Sharamitaro

4/22/2025

**Property Owner’s or
Authorized Agent’s Signature**

Date

**Town of Archer Lodge, NC
14094 Buffalo Road
Archer Lodge, NC 27527**

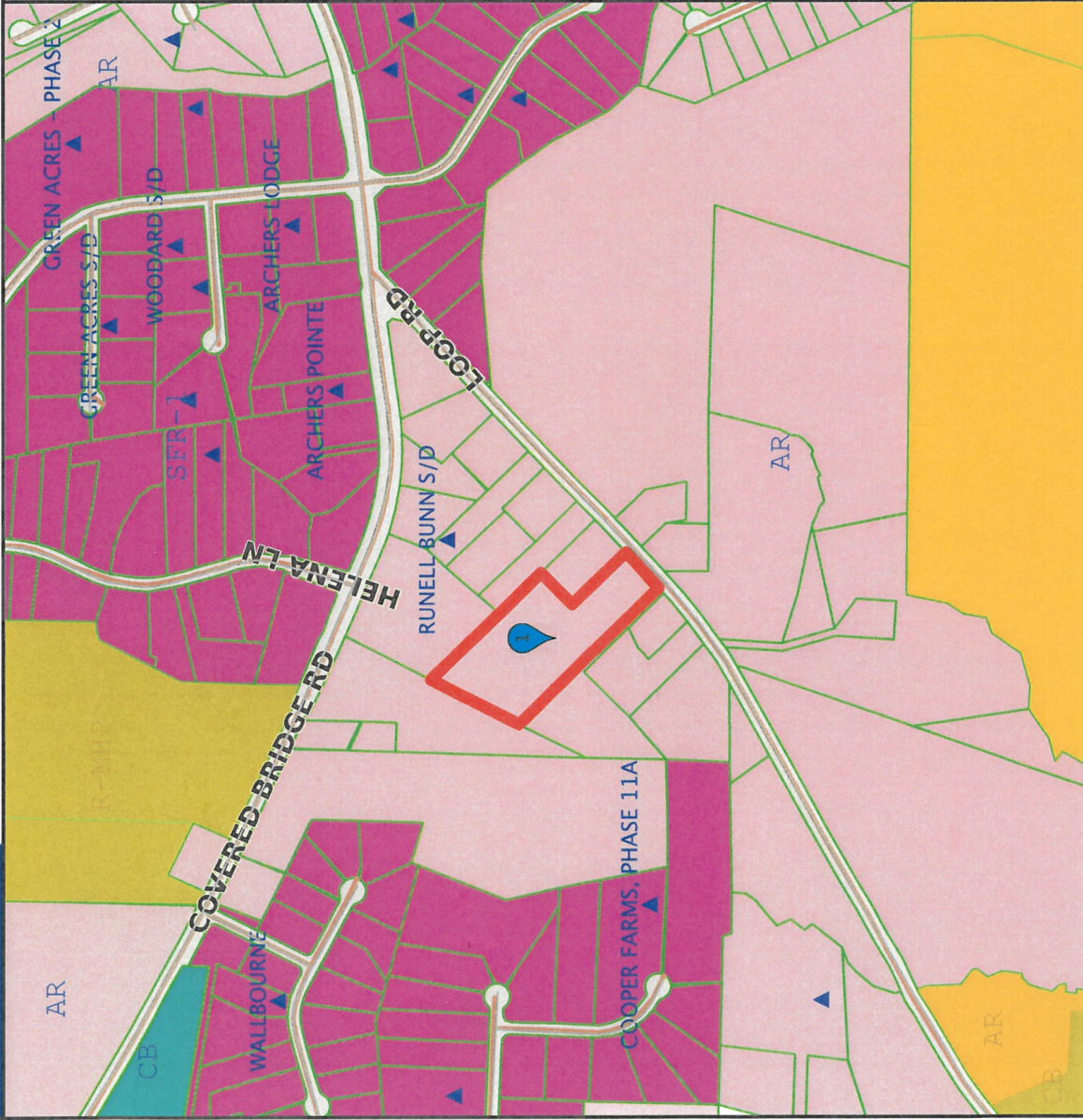
**Main: 919.359.9727
Fax: 919.359.3333**

Web Site: <https://www.archerlodgenc.gov/planning-zoning>



*** DISCLAIMER ***

Johnston County assumes no legal responsibility for the information represented here.



Result 1

id: 16J030761
 Tag: 16J030761
 NCPin: 177004-94-8991
 Mapsheet No: 177004
 Owner Name 1: AUBECA, LLC
 Owner Name 2:
 Mail Address 1: 244 JOSIAH DR
 Mail Address 2:
 Mail Address 3: CLAYTON, NC 27527-4245
 Site Address 1: 180 LOOP RD
 Site Address 2: ARCHER LODGE, NC 27527-
 Book: 06612
 Page: 0413
 Market Value: 590530
 Assessed Acreage: 5.620
 Calc. Acreage: 5.685
 Sales Price: 630000
 Sale Date: 2024-02-05



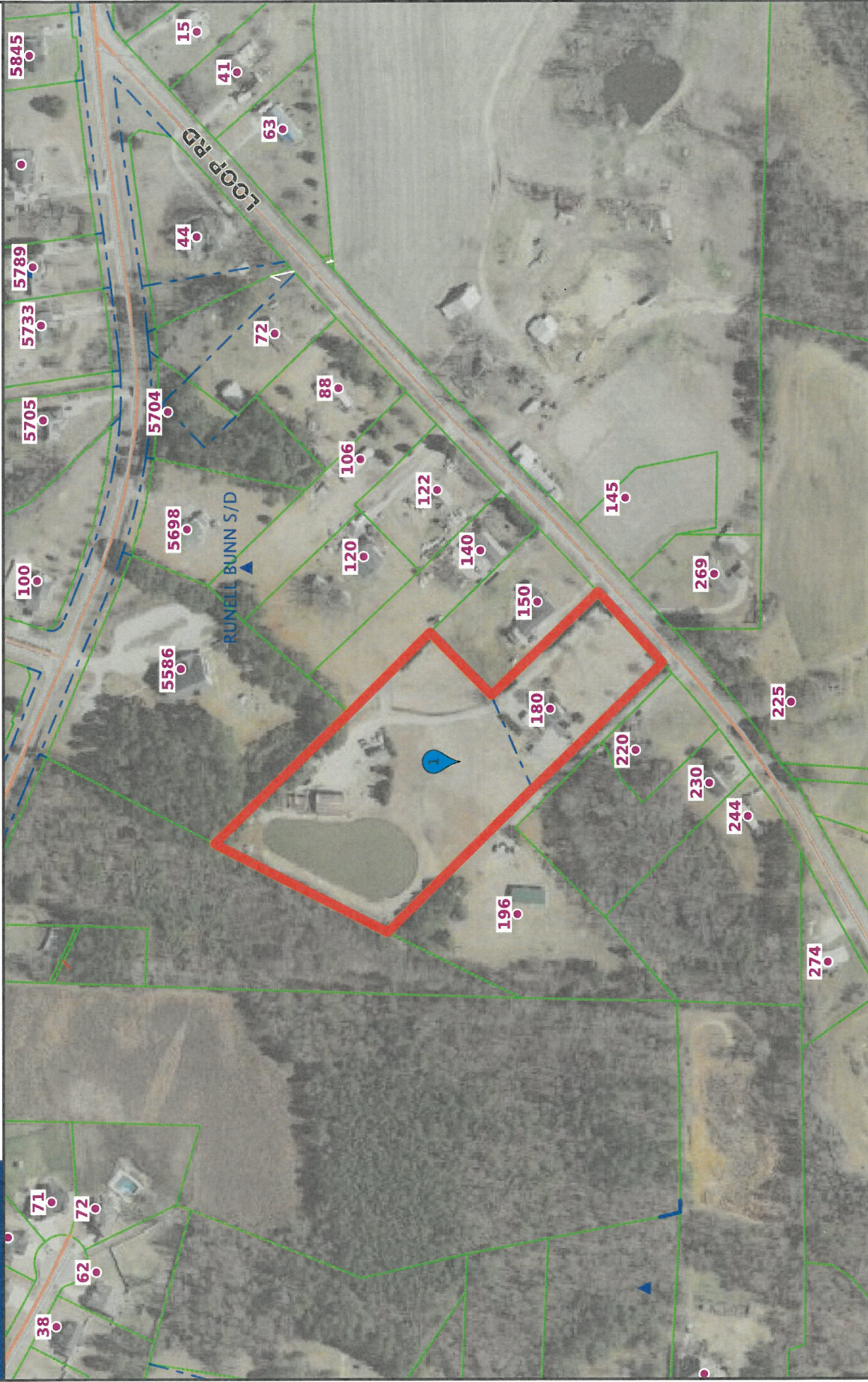
Scale: 1:8043 - 1 in. = 670.24 feet

(The scale is only accurate when printed landscape on a 8 1/2 x 11 size sheet with no page scaling.)



*** DISCLAIMER ***

Johnston County assumes no legal responsibility for the information represented here.

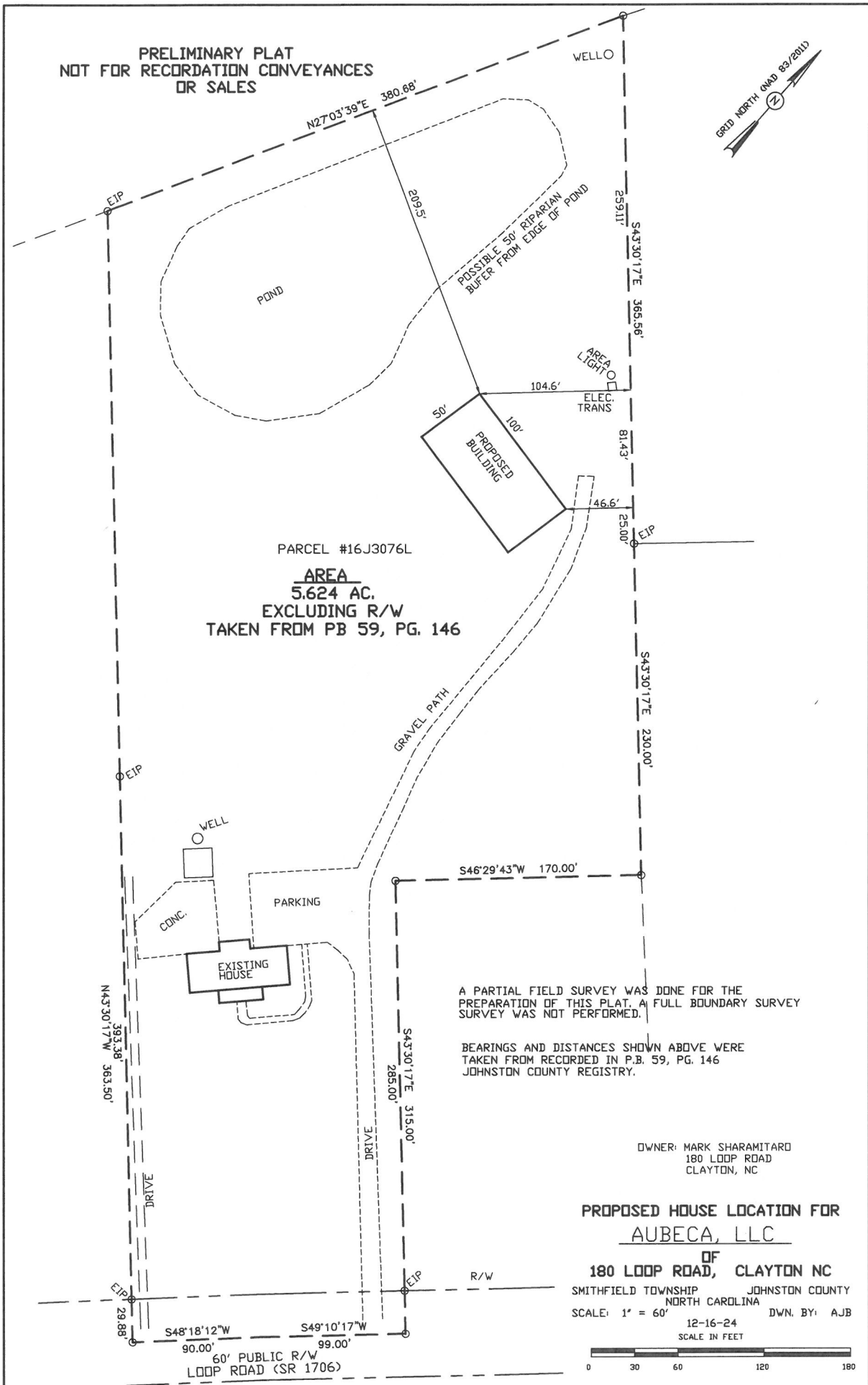


Scale: 1:3267 - 1 in. = 272.25 feet

(The scale is only accurate when printed landscape on a 8 1/2 x 11 size sheet with no page scaling.)

Johnston County GIS
May 12, 2025







Permit #: _____
Fee: \$ _____; Receipt No. _____
Payment Method: Ck# _____
Cash: Other: Pay Date: _____
Application Received: _____

TOWN OF ARCHER LODGE DEVELOPMENT PERMIT APPLICATION

1. Check Applicable Type of Permit(s) and Use:

Zoning Compliance Permit Watershed Protection Permit Floodplain Development Permit

New Construction – Single Family (stick built/modular) Double Wide Manufactured Home – Year: _____
 Structural Addition/Modification Single Wide Manufactured Home – Year: _____
 Accessory Use (i.e., deck, shed) Dimensions: 50x100 Other: Free Standing, Enclosed Metal Building Structure

2. Proposed building/structure square footage: 5000 ; Stories: 1 ; and height (measured in ft. from average grade to peak of roof/structure: 15-16; Proposed use: Storage Building
Pre-Engineered Metal Building with monolithic slab concrete foundation.; Cost of Construction: 250,000

3. Property Owner: Mark Sharamitaro - AUBECA, LLC Phone: 919-920-2032
Address: 180 Loop Rd, Archer Lodge, NC 27527 Email: mark@sharamitaro.com

4. Applicant/Agent: JOHN INMAN, agent for Inco Steel Buildings Corporation Phone: 919-335-8099
Address: PO BOX 117 Rolesville NC 27571 Email: Office@IncoSteelBuildings.com

5. Site Address: 180 Loop Rd, Archer Lodge, NC 27527 Subdivision: WILDERS Lot _____

6. Site PIN# 177004-94-8991 or Tax Tag ID # 177004-94-8991 Lot size (acreage): 5.62

7. Utilities (check all that apply): County Water: ; Well: ; County Sewer: ; Septic:

8. Please include the following information with the application:

- Sketch plan, drawn to scale, showing - lot boundaries, building setback lines, buildings locations - principle use and accessory (existing and proposed), driveway/sidewalks, impervious surface areas on the lot (existing and proposed) and applicable square footage totals, easements, streams, buffers, wetlands, and floodplains.
- Copy of Johnston County Improvement Permit if the lot is served by a septic system.
- Copy of Property Deed; and, if you are not the property owner applying for the permit, the property owner must give you written consent to apply for the permit. (A blank consent for is included in the application material on page 3.)
- Other: Plat Plan by Surveyor (provided to INCO STEEL BUILDING CORP.) by the Land Owner Mark Sharamitaro

Note: Additional information, including property survey, may be required upon review of the application and attachments to determine compliance with ordinance provisions. Contact Jason Kress, Town Planner if you have any questions regarding the above at 919.359.9727 or e-mail jason.kress@archerlodgenc.gov. Ordinance provisions can be viewed on the Towns website: <https://www.archerlodgenc.gov/planning-zoning>; and the permitting process is outlined on the Town's website at <https://www.archerlodgenc.gov/PermittingProcess>

9. **Applicants Certification:** I certify that all the statements made in this application and any attached documentation are true, complete and correct to the best of my knowledge and belief and are made in good faith. I understand that false information may result in the rejection of this permit or subsequent revocation of this permit. Authorized town officials are granted right of entry to make evaluations or inspections as to compliance and to release information upon public request. I understand that additional State and County permits may be required prior to occupancy of requested use. I further understand that a Zoning Certificate of Compliance shall be required and issued by the Town of Archer Lodge prior to the occupancy and/or commencement of operations of the proposed use.

JOHN INMAN

Print Name

John Inman
Signature of Applicant

office@incosteelbuildings.com
Date: 3/6/25 MARCH 05, 2025
9:18:07AM EST
Date

¹ Application for single family dwellings (including manufactured homes) or duplexes, residential additions (alterations), accessory structures or accessory uses on a lot.

AGENT AUTHORIZATION / OWNER'S CONSENT FORM

AGENT/APPLICANT INFORMATION:

JOHN INMAN, agent for Inco Steel Buildings Corporation

(Name)

PO BOX 117

(Address)
ROLESVILLE, NC 27571

(City, State, Zip)

I hereby give CONSENT to the above referenced agent/applicant to act on my behalf, to submit applications and all required materials and documents.

Furthermore, I hereby give consent to the party designated above to agree to all terms and conditions which may arise as part of the approval of this application.

I hereby certify that I have authority to execute this consent form as/on behalf of the property owner. I understand that any false, inaccurate or incomplete information provided by me or my agent will result in the denial, revocation or administrative withdrawal of this application, request, approval or permits. I further agree to all terms and conditions which may be imposed as part of the approval of this application.

OWNER AUTHORIZATION:

Mark Sharamitaro - AUBECA, LLC

Name

180 Loop Rd

Address
Archer Lodge, NC 27527

City, State, Zip

Mark Sharamitaro

Owner's Signature

DigiSigned by 03/06/2025
mark@sharamitaro.com
Date: 3/6/25
9:19:36AM EST

Date

OFFICIAL USE – STAFF ANALYSIS

Permit #: _____ Zoning District: _____ Lot Size: _____

Application Received on: _____ Application Complete? Y/N

Associated Subdivision/Project Approval(s): _____

Flood Zone: _____ FIRM Map/Panel: _____

Special Flood Hazard Area: Yes No Permit required? Y/N

Water Supply Watershed Protection District: Yes No Permit required? Y/N

Utility Services: Public Water Well Public Sewer Septic System

Is Structure in the Right-of-Way of any of the following (check all that apply):

Utilities Easement NCDOT ROAD or Other Road or sight triangle Proposed Thoroughfare/Shared Use Path None

	Required	Provided
Lot Area		
% of Impervious Surface		
Lot Width		
Setbacks		
Front		
Side		
Rear		
Max Building Height - Principal		
Max Building Height - Accessory		
Accessory Building Setbacks		

Comments:

DigiSigner Document ID: 5ea54d54-0b71-4c4d-8225-cc5b303098e5

Signer

Email: office@incosteelbuildings.com
IP Address: 2603:6080:9403:780b:481c:d82e:25b0:7df2

Email: mark@sharamitaro.com
IP Address: 96.43.55.174

Signature




Event	User	Time	IP Address
Upload document	office@incosteelbuildings.com	3/6/25 9:15:35AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Open document	office@incosteelbuildings.com	3/6/25 9:15:38AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Close document	office@incosteelbuildings.com	3/6/25 9:16:58AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Open document	office@incosteelbuildings.com	3/6/25 9:17:02AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Sign document	office@incosteelbuildings.com	3/6/25 9:18:07AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Close document	office@incosteelbuildings.com	3/6/25 9:18:07AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Open document	office@incosteelbuildings.com	3/6/25 9:18:10AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Close document	office@incosteelbuildings.com	3/6/25 9:18:31AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Send for signing	office@incosteelbuildings.com	3/6/25 9:19:07AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Open document	mark@sharamitaro.com	3/6/25 9:19:23AM EST	96.43.55.174
Sign document	mark@sharamitaro.com	3/6/25 9:19:36AM EST	96.43.55.174
Close document	mark@sharamitaro.com	3/6/25 9:19:36AM EST	96.43.55.174
Open document	office@incosteelbuildings.com	3/6/25 9:29:14AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2
Close document	office@incosteelbuildings.com	3/6/25 9:32:42AM EST	2603:6080:9403:780b:481c:d82e:25b0:7df2

4.6

JOHNSTON COUNTY ENVIRONMENTAL HEALTH DEPARTMENT

205 South Second Street
Smithfield, North Carolina 27577
Telephone (919) 989-5180

Application No.: 48007

Tax Map No.: _____

Date: 2-26-98

IMPROVEMENT PERMIT

Name: Troy Lee

Address: _____

Location: SR-1706 - Take 1003 to Archers Lodge T/L on SR-1700 T/L on SR-1706 1/4 mile - 1/2 mile on right.

Facility: Residential S/D Lot No.: _____ LTAR: .35-.4

Bedrooms: 4 Design Daily Sewage Flow: 30 gpd 480 Lot Area: ± 6.01 AC

New Construction: Repair: _____ Water Supply: _____

Soil/Site Classification: P.S.

Septic Tank Size: 900 gal + 1000 gal Grease Trap Size: _____

Pump Tank Size: N/A Pump(s) Size: N/A

Drainfield Type: Conv. Square Feet: 990 sq' - 1070 sq' - 1350

No. Lines: 3 Width: 3' Length: 110 / 85 150' Depth: 22"

Design/Layout by: _____ Permit Issued By: R. Mills

Inspection: Lines: MS 3-150 Septic Tank/Box: 1000 gal mep

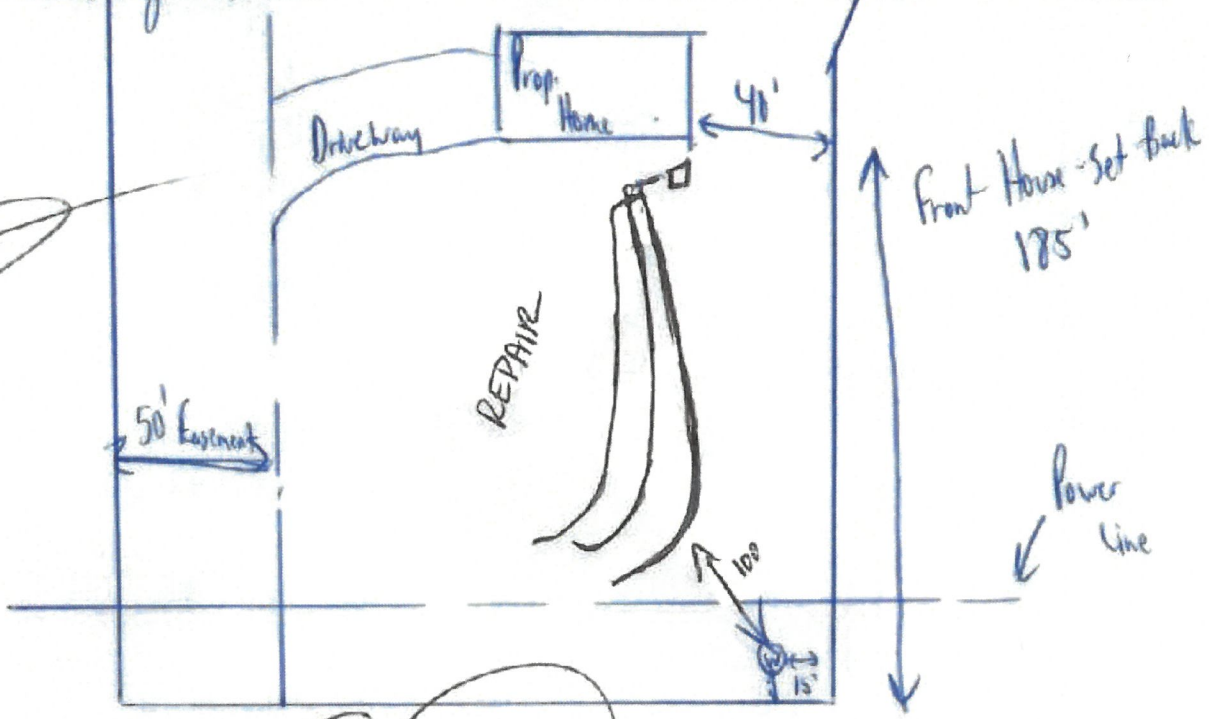
Pump Tank: _____ Pump(s)/Pressure: _____

Drainage: _____ Contractor: T Lee

AUTHORIZATION FOR WASTEWATER SYSTEM CONSTRUCTION

ISSUED BY: Robert Mills J. R.S. DATE ISSUED: 2-26-98

Changes made to 40' per owners request. MSE



OPERATION PERMIT BY: MSE DATE: 10/30/98

Systems shall be installed as shown in sketch or as on attached plans and specifications. Any unauthorized site disturbance, filling, soil removal, or layout changes may result in this permit being revoked. This authorization for wastewater system to construct is good for 5 years from date of issue.



Work Session - Minutes Monday, May 19, 2025

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Buzzelli
Council Member Bruton
Council Member Jackson
Council Member Wilson (Remotely)

STAFF PRESENT:

Kim P. Batten, Assist. Town Admin./Finance Officer
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

STAFF ABSENT:

Bryan Chadwick, Town Administrator

Page

1 WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mullhollem called the meeting to order at 6:59 p.m in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2 RECOGNITION/PRESENTATION:

4 a) Proclamation - Memorial Day 2025

Mayor Mulhollem honored and remembered those who lost their lives while serving in the US Military by reading the Memorial Day 2025 Proclamation.

The signed Memorial Day Proclamation is attached below.

[Proclamation - Memorial Day 2025 - Signed](#)

3 BUDGET PRESENTATION:

5 - 100 a) Proposed Annual Budget Ordinance Presentation for Fiscal Year Ending June 30, 2026 ~ Kim Batten, Assistant Town Administrator/Finance Officer

Ms. Batten greeted all in attendance and read the FY25-26 Budget Message from Budget Officer/Town Administrator Bryan Chadwick. Ms. Batten reviewed tables and data presented in Proposed Annual Budget Ordinance as

well as proposed changes and adjustments. The Proposed Annual Budget Ordinance Presentation for Fiscal Year Ending June 30, 2026 is attached below.

[PROPOSED BUDGET FY 25-26](#)

b) Budget Discussion Continued

Mayor Mulhollem prompted Council to present any questions and comments that they would like to share or present to staff to start budget discussions. Council Member Bruton shared that in her opinion, she finds a problem with keeping the 32 cent tax rate and what the revenue increase that calculates to for the Town. Ms. Batten explained the revenue neutral calculations that she provided as well as the reason for that based on the information that she received for the Town from the county and their tax collections.

Council Member Buzzelli shared that, in his opinion, revenues do need to be increased; however, increasing by 68 percent seems excessive. Discussion followed. Mayor Mulhollem and Ms. Batten discussed the percentage of revenues that come directly from property taxes. Mayor Mulhollem shared that a 1 cent tax levy would calculate to be approximately \$68,571.00. Discussion followed.

Council Member Bruton asked if there were any updates from the county regarding the county tax rate. Ms. Batten shared that she had received the county data for May that had decreased slightly but nothing to warrant any changes on this proposal. Council Member Bruton asked if there were any changes from the first draft of the Proposed Budget to the draft that they were presented at this meeting. Ms. Batten shared that the changes included: 2% COLA, removal of Town Hall parking lot resurfacing, and removal of decorative street lights. Discussion followed. Ms. Batten shared that the current Proposed Budget puts \$116,520 back into the fund balance. Discussion followed regarding meeting the fund goals set by the auditor. Ms. Batten presented proposed changes to the fee schedule for Parks and Recreation Department. Mr. Allen shared that there needs to be an increase in the fees for certain programs with this proposed budget due to the increase in size of the baseball and softball programs. The increases he proposed are \$10 each for baseball and softball. Discussion followed. Town Planner, Jason Kress shared that all code enforcement and planning and zoning fees are to remain the same.

Discussion regarding property tax incentives for senior citizens.

Council Member Bruton asked regarding the current expenses for cutting and maintaining the grass as well as the possibility to look into other options. Ms. Batten shared that the issue that the Town faces with this is that the Town requires the contractors that do the work to have a certain level of insurance and that in itself increases the cost of the services that they are contracting. Council members posed questions about using current part-time staff to maintain the Town Hall grounds and what the cost of that would be including labor and equipment to compare to the current arrangement. Discussion followed.

Discussion regarding cutting the funding for trainings. It was expressed by Members of the Council that the proposed budget includes funding for trainings that could potentially be cut in order to replenish the general fund and/or give money back to the tax payer by adjusting the tax rate. Discussion regarding the proposed professional fees expenses. Ms. Batten shared that typically professional fees are for expenses that were unpredictable at the time of budget creation. Council Member Jackson shared that in his opinion, the purpose of the professional expenses budget is to be prepared just in case.

Council Member Bruton asked if there was any update regarding the fire department tax rate. Mayor Mulhollem shared that he was under the impression that the county was meeting that evening to discuss the rates. Discussion followed.

Mayor Mulhollem shared that in his opinion, he was satisfied with the debt number for the Town. Council Member Buzzelli agreed.

Discussion regarding how the Council planned to proceed for continuing budget conversations. Mayor Mulhollem suggested that there is a special

meeting scheduled after the public hearing in order to make any changes.

4 ADJOURNMENT:

a) Mayor Mulhollem called for a motion to adjourn the meeting.

Moved by: Council Member Jackson

Seconded by: Council Member Wilson

Approved to adjourn the meeting at 8:21 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



Proclamation



MEMORIAL DAY - 2025

WHEREAS, Memorial Day each year serves as a solemn reminder of the scourge of war and its bitter aftermath of sorrow; and

WHEREAS, this day has traditionally been devoted to paying homage to loved ones who lie in hallowed graves throughout the land, having sacrificed their lives that war might end; and

WHEREAS, in tribute to these silent dead it is fitting that we lift up our voices together in supplication to the Almighty God for wisdom in our search for enduring peace; and

WHEREAS, the Congress, in a joint resolution approved May 11, 1950, provided that Memorial Day should be set aside as a day of prayer for permanent peace; and

WHEREAS, today, and every day, let us remember the servicemen and women we have lost and let us honor them by rededicating ourselves to strengthening our Nation's promise. With love, grace, and reflection, let us honor our fallen fellow Americans, known and unknown, who sacrificed their freedom to ensure our own.

NOW, THEREFORE, LET IT BE PROCLAIMED by the Honorable Mayor and the Town Council of the Town of Archer Lodge, North Carolina, that May 26, 2025, be recognized as

Memorial Day

The town encourages citizens to join together in their homes, places of work, and places of worship to pray for permanent peace and to continue to pray for our town, our state, and our nation.

Proclaimed this the 19th day of May 2025.

Matthew B. Mulhollem
Mayor

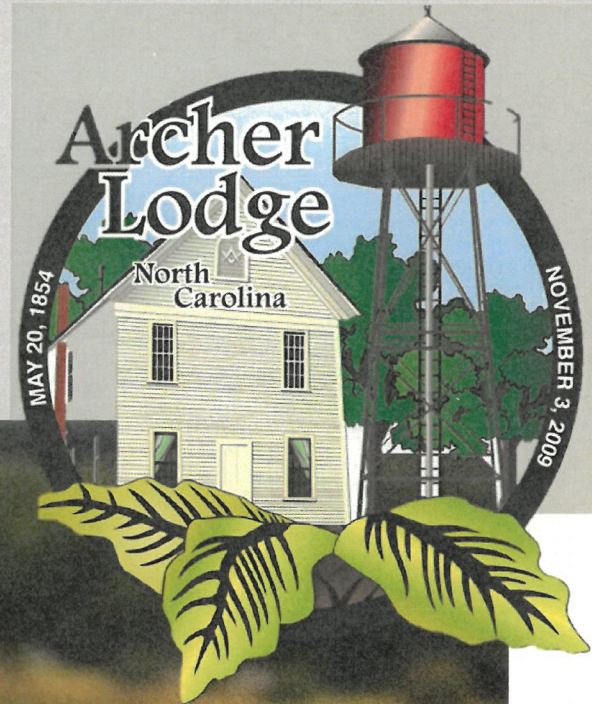
ATTEST:

Jenny Martin
Town Clerk



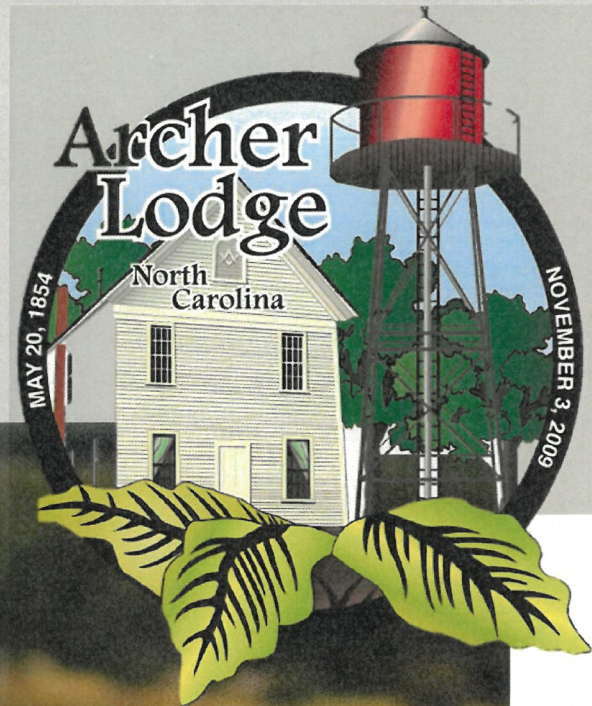
PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



BUDGET MESSAGE



TOWN OF ARCHER LODGE

14094 Buffalo Road
Archer Lodge, NC 27527
Main: 919-359-9727
Fax: 919-359-3333

Mayor:

Matthew B. Mulhollem

Council Members:

Clyde B. Castleberry

Mayor Pro Tem

Teresa M. Bruton

John T. Buzzelli

J. Mark Jackson

Mark B. Wilson

Annual Budget Message 2025-2026 Fiscal Year Budget

To: Honorable Mayor and Members of the Archer Lodge Town Council
Archer Lodge, North Carolina

From: Bryan R. Chadwick, Budget Officer/Town Administrator

Date: May 19, 2025

Archer Lodge continues to experience rapid growth. Its sixteen-year history has challenged and continues to challenge Town Council in meeting the needs of the Town and incorporating the direction it needs to go.

The Parks and Recreation Department continue to provide exciting opportunities and wonderful facilities for citizens and visitors to the Town. Programs across all spectrums have been introduced for young and old alike. The Planning and Zoning Department has been extremely busy engaging with developers and property owners for new uses for properties throughout Town. This is only proof that people are coming to Archer Lodge and will continue to come.

Following this budget message for your review and consideration, you will find the proposed Annual Budget for fiscal year 2025-2026 for the Town of Archer Lodge in the amount of **\$4,120,700**. This amount includes considerations for the following funds:

- 1) General Fund,
- 2) Capital Reserve Fund,
- 3) Park Reserve Fund, and
- 4) Public Safety Reserve Fund.

Following numerous Budget Planning Sessions/Discussions starting last fall, Ms. Batten, Assistant Town Administrator/Finance Officer, along with myself, examined comments and notations mentioned during this budgeting process. This approach for our budget workshops assisted the Town Council and staff in understanding the budget, the budget worksheets, and how numbers are compiled. It also provided many discussions for each department regarding changes and other considerations. These meetings were sometimes difficult and raw but necessary to move the discussion forward for results.

Johnston County Tax Administration conducted a revaluation of properties over the past year. Final values are still being compiled including the Fire District Tax. You will remember that we have utilized fund balance over the past two years to balance the budget. This was highlighted by our auditor of not being sustainable and being below a recommended threshold.

After speaking with most council members individually concerning this and discussing a path forward, I recommend maintaining the tax rate at \$0.32/\$100. This is recognizing that the revenue neutral tax rate is \$0.1918/\$100.

Following several drafts, meetings, and conversations, I feel certain that my proposed budget best represents the current suggestions from the Town Council and the current needs for the citizens of the Town of Archer Lodge.

The tables below present an overview of projected revenues and anticipated expenditures for the four funds for fiscal year ending June 30, 2026.

The following tables represent the **General Fund 10**:

General Fund 10 Expenditures:	Proposed Anticipated Expenditures (FY 2025-2026)
General Government	\$ 840,100.00
Public Safety	\$ 1,308,300.00
Transportation	\$ 28,600.00
Economic & Physical Development (P/Z)	\$ 251,230.00
Cultural and Recreation	\$ 561,600.00
Debt Service	\$ 136,350.00
Capital Outlay	\$ -
Transfer To Other Funds	\$ 406,520.00
Total Estimated/Appropriated	\$ 3,532,700.00

General Fund 10 Revenue Sources:	Proposed Projected Revenues (FY 2025-2026)
Ad Valorem Taxes	\$ 2,208,000.00
Unrestricted Intergovernmental	\$ 648,500.00
Restricted Intergovernmental	\$ 82,200.00
Permits and Fees	\$ 59,500.00
Parks & Recreation Fees/Rentals	\$ 90,000.00
Investment Earnings	\$ 40,000.00
Miscellaneous	\$ 5,500.00
Transfer From Other Funds	\$ 399,000.00
Fund Balance Appropriated	\$ -
Total Revenues / Estimated Resources	\$ 3,532,700.00

QUICK POINTS OF THE GENERAL FUND:

- Reinstatement of Annual Transfer of \$50,000 to Capital Reserve Fund and Public Safety Reserve Fund
- Property/Liability Insurance increases based on property additions and new appraised values
- Worker's Comp Insurance increases based on increased human capital
- Current Staff:
 - ✓ 2% Reduction in Employer's 401K contribution (8% to 6%)
 - ✓ 2% Increase Adjustment in FT Employee's salary due to offset of 401K
 - ✓ Up to 2% Merit Increase based on Annual Performance Evaluation
- Law Enforcement Consideration = 7 days a week / 12 daylight hours a day
- Contracted Services and Utilities in Public Buildings increased for Town Park Facilities and ALCC Facilities being managed
- Professional Fees – Design/Engineering Services, Auditing, and Legal
- Contracted Services for Needed Website Upgrade
- Parks & Rec Department – Lease Reel mower
- Completion of Land Use Plan Update - Contract work by CodeWright Planners
- Public Safety Department represents 37% of budget

The following table represents the **Capital Reserve Fund 30:**

Capital Reserve Fund 30:	Proposed Estimates (FY 2025-2026)
Investment Earnings	\$ 1,000.00
Transfer from General Fund 10	\$ 50,000.00
Transfer to Fund Balance	\$ (51,000.00)
Revenue Totals = Expenditure Totals	\$ -

QUICK POINTS OF THE CAPITAL RESERVE FUND:

- Reinstatement Annual Transfer of \$50,000
- Investment earnings received will be transferred to fund balance

The following table below represents the **Park Reserve Fund 31:**

Park Reserve Fund 31:	Proposed Estimates (FY 2025-2026)
Investment Earnings	\$ 2,000.00
Transfer from General Fund 10	\$ 190,000.00
Transfer to General Fund 10	\$ (54,000.00)
Transfer to Fund Balance	\$ (138,000.00)
Revenue Totals = Expenditure Totals	\$ -

QUICK POINTS OF THE PARK RESERVE FUND:

- Transfer from General Fund consists of:
 - Two Cents Property Taxes Estimate = \$135,750
 - Fee in Lieu of Rec – 36 Lots @ \$1,500 = \$ 54,000
- Transfer to General Fund – Loan Payment on Park Land \$54,000

The following table represents the **Public Safety Reserve Fund 32:**

Public Safety Reserve Fund 32:	Proposed Estimates (FY 2025-2026)
Investment Earnings	\$ 12,000.00
Transfer from General Fund 10	\$ 50,000.00
Fund Balance Appropriated	\$ 283,000.00
Transfer to General Fund 10	\$ (345,000.00)
Revenue Totals = Expenditure Totals	\$ -

QUICK POINTS OF THE PUBLIC SAFETY RESERVE FUND:

- Reinstatement Annual Transfer of \$50,000
- Utilize Public Safety Reserve Funds for the General Fund Public Safety / Law Enforcement Consideration = 7 days a week /12 daylight hours a day

The following table summarizes the **Proposed Annual Budget for Fiscal Year Ending June 30, 2026:**

Total Proposed Annual Budget for All Funds (FY 2025-2026)	Total Proposed Estimated Revenues for All Funds	Total Proposed Estimated Expenditures for All Funds
Revenue Totals = Expenditure Totals	\$ 4,120,700.00	\$ 4,120,700.00

Below you'll find a table that represents the Ad Valorem Tax Revenues projected in the budget, however a conservative figure of \$2,205,000 is recommended.

Date	Type	Net Assessed Value	Provided By	Levy \$0.32 / \$100
12/31/2024	Motor Vehicles	\$ 67,417,216	Jo Co Tax Office	\$ 215,735
08/29/2024	Public Service Companies	\$ 5,896,439	NC Dept of Rev	\$ 18,868
05/02/2025	Real and Personal Property	\$ 622,837,408	Jo Co Tax Office	\$ 1,993,080
07/01/2025	TOTAL	\$ 696,151,063		\$ 2,227,683
PROPOSED	AD VALOREM	TAXES	CONSERVATIVE	\$ 2,205,000

The final table is the Town’s **Debt Service**:

LOAN	LENDER	BALANCE BEFORE PAYMENT	PAYMENT DUE	FY 25-26	BALANCE AFTER PAYMENT
Town Hall	Truist Gov’t	\$ 66,667	03/22/26	\$ 35,607	\$ 33,333
Park Loan	M/M G. Smith	\$ 100,000	08/20/25	\$ 54,000	\$ 50,000
Town Hall Expansion	KS Bank	\$ 243,000	09/10/25	\$ 35,189	\$ 216,000
TOTAL		\$ 409,667		\$ 124,796	\$ 299,333

The proposed budget for fiscal year ending June 30, 2026 shows an increase of \$860,745 over the current year’s amended budget of \$3,259,955 as shown below:

Current Year (FY 2024-2025) Revenues as Amended	Proposed Projected Revenues (FY 2025-2026)
\$ 3,259,955	\$ 4,120,700

This is a “no frills” budget. Considerations were removed to reduce the overall budget and those items remaining help continue to meet the essential services for the citizens yet demonstrate fiscal constraint. Even with the reduced list, there are continued recurring costs that are being funded and will continue in all fiscal years.

Unfortunately for our citizens, there are no new programs, services or projects planned. This budget is only for the continuation of current programs, current services and the costs to maintain them.

The Town Council will need to consider plans and provide guidance to staff in future years and for future functions. These coming years will have continued population growth requiring services and programs demanded by the public. What has been produced from the efforts of previous councils and citizens has been extremely successful, so I challenge you to “step up to the plate” and follow in their footsteps because your next steps will be very important to the viability of the Town.

As you’ve learned and witnessed, being a municipality is not an easy endeavor, and sometimes tough discussions and decisions are required by the Town Council in order to meet the needs of the entire population of Archer Lodge. A large portion of the citizens chose to make Archer Lodge their home for some reason, so the town must be operating pretty well since the 2009 incorporation.

The town is no longer “crawling,” “toddling,” “walking;” the town is in fact “running” but not at a fast pace. One day on the horizon, the town will be “sprinting,” so as elected officials, your time is now to **PLAN** and **CONTINUE** in the forward direction set forth by others with a positive frame of mind for your municipality and for the citizens.

Additional items needing to be considered for the future growth are:

- Countywide fire district cost share program,
- Code enforcement,
- Additional human capital in the Parks & Recreation Department,
- Pickle ball courts in phase 2 of the town park,
- Parks & Recreation Department office building with additional features for indoor activities and additional rental spaces,
- Additional services for citizens

The Town has been fortunate to have great partners in the area, which has helped tremendously while the Town develops its own path.

In closing, many thanks to our Assistant Town Administrator/Finance Officer for her work on this budget. I also want to thank the staff for their time during this budget process. Every member of staff continues to be dedicated to the Town of Archer Lodge and committed to completing the work the citizens and Town Council have set forth.

I especially want to thank the Town Council for engaging in this process because your input and guidance were considered in developing this recommended budget.

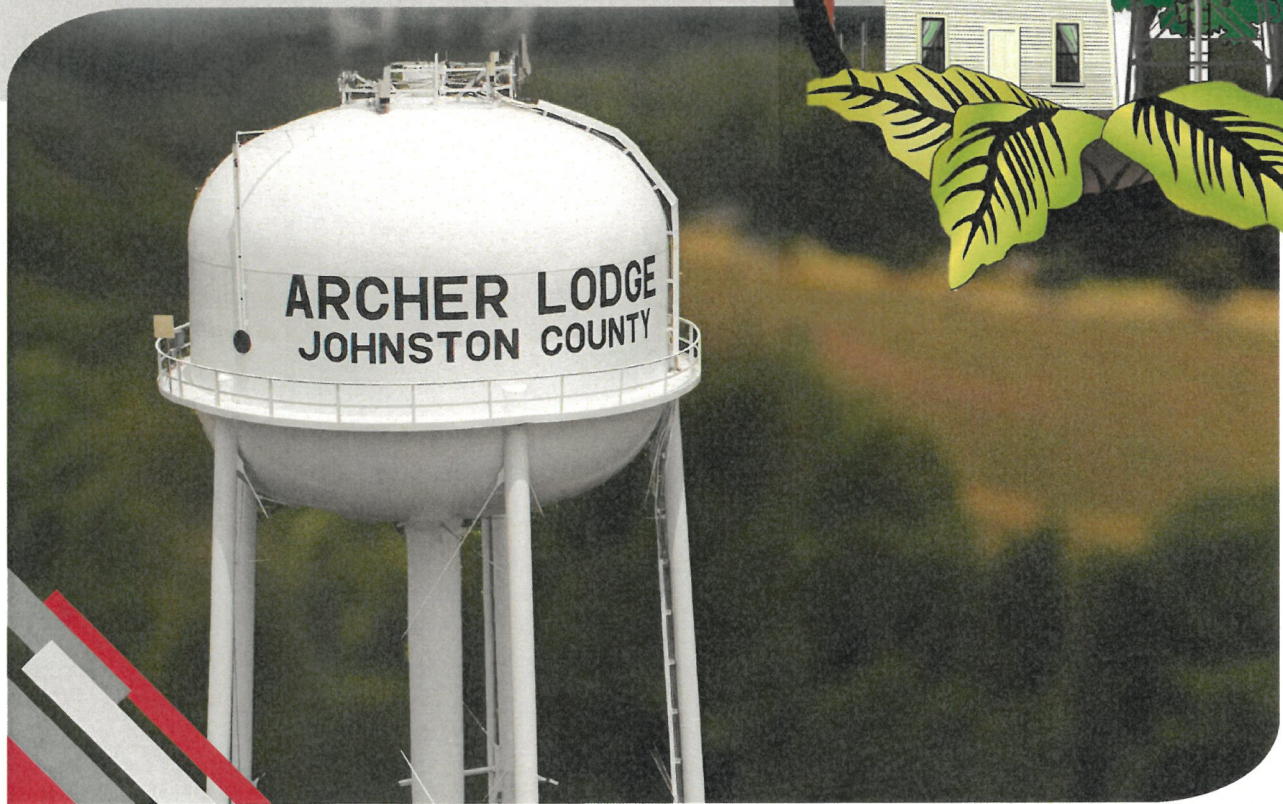
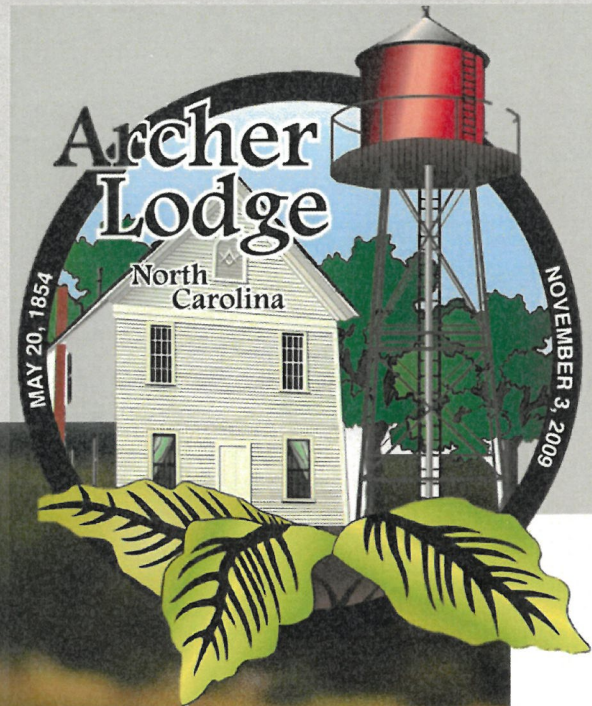
Archer Lodge continues to be a shining example of community and will continue to be a great place to be in Johnston County.

Respectfully submitted,

Bryan R. Chadwick
Budget Officer/Town Administrator

PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



BUDGET ORDINANCE

Town of Archer Lodge, North Carolina
ANNUAL BUDGET ORDINANCE
 Fiscal Year July 1, 2025 to June 30, 2026

BE IT ORDAINED by the Town Council of the Town of Archer Lodge, Johnston County, North Carolina, pursuant to §159-7 thru §159-17, that: (1) the sum of estimated net revenues and appropriated fund balance in each fund shall be equal to expenditures in each fund for Fiscal Year 2025~2026; (2) departmental expenditures for the fiscal year shall not exceed the estimated departmental totals as depicted below and on the following pages: General Fund 10 = \$3,532,700; Capital Reserve Fund 30 = \$51,000; Park Reserve Fund 31= \$192,000; and Public Safety Reserve Fund 32 = \$345,000; all funds totaling a **Budget Ordinance of \$4,120,700**; (3) Revenues from the Ad Valorem Property Tax shall be levied in the amount of **\$0.32 per \$100 evaluation** consisting of \$0.14 North Side Fire District Tax (appropriated in Public Safety for the North Side Fire & Rescue), \$0.02 Park Reserve Fund 31 Designation and General Fund 10 receiving the balance of \$0.16; and (4) due to the 2025 Tax Revaluation Year for Johnston County, the Revenue Neutral Tax Rate would be \$0.1918 per \$100 evaluation for the Town of Archer Lodge and is provided for comparison purposes only.

General Fund 10

General Fund 10 Revenues:	<u>Amount</u>
Ad-Valorem Property Taxes	\$ 2,208,000
State Sales Tax Distributions	432,000
Unrestricted Intergovernmental Revenues	216,500
Restricted Intergovernmental Revenues	82,200
Permits and Fees	5,500
Parks and Recreation Fees/Rentals	90,000
Fee in Lieu of Recreation	54,000
Miscellaneous Revenues	5,500
Investment Earnings	40,000
Transfers in from Park Reserve & Public Safety Reserve Funds	399,000
General Fund Balance Appropriated	<u>-</u>
Total Revenues	\$ 3,532,700
General Fund 10 Expenditures:	
General Government	\$ 840,100
Public Safety	1,308,300
Transportation/Streets - Public Works	28,600
Planning and Zoning	251,230
Parks and Recreation	561,600
Debt Service	136,350
Interfund Transfers	<u>406,520</u>
Total Expenditures	\$ 3,532,700
Revenues Over (Under) Expenditures	<u>-</u>

Town of Archer Lodge, North Carolina
ANNUAL BUDGET ORDINANCE
 Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10

	Amount
General Fund 10 Revenues:	
Ad-Valorem Property Taxes	\$ 2,208,000
State Sales Tax Distributions	432,000
Unrestricted Intergovernmental Revenues	216,500
Restricted Intergovernmental Revenues	82,200
Permits and Fees	5,500
Parks and Recreation Fees/Rentals	90,000
Fee in Lieu of Recreation	54,000
Miscellaneous Revenues	5,500
Investment Earnings	40,000
	\$ 3,133,700
General Fund 10 Expenditures:	
General Government	
Governing Body	\$ 57,600
Administration	451,300
Tax Collections	56,000
Legal	18,000
Property Tax	100
Public Buildings	174,900
PEG Media Partners	82,200
Public Safety	
Law Enforcement	345,000
Animal Control	13,000
North Side Fire & Rescue, Inc	950,300
Transporation - Public Works	
Streets	28,600
Planning and Zoning	251,230
Parks and Recreation	561,600
Debt Service	
Principal and Interest	136,350
	3,126,180
Revenues Over (Under) Expenditures	7,520
Interfund Transfers:	
General Fund Balance Appropriation	-
Transfer in from Capital Reserve Fund	-
Transfer in from Park Reserve Fund	54,000
Transfer in from Public Safety Reserve Fund	345,000
Interfund Transfers to Other Reserve Funds	(290,000)
Total Other Financing Sources (Uses):	225,520
Total Revenues Over (Under) Expenditures and Other Financing Sources (Uses)	\$ -

Tax Rate Per \$100 of Valuation \$ 0.32

Town of Archer Lodge, North Carolina
ANNUAL BUDGET ORDINANCE
 Fiscal Year July 1, 2025 to June 30, 2026

Capital Reserve Fund 30

	<u>Amount</u>
<i>Capital Reserve Fund 30 Revenues:</i>	
Investment Earnings	1,000
Total Revenues	\$ 1,000
<i>Capital Reserve Fund 30 Expenditures:</i>	
N/A	
Total Expenditures	\$ -
Revenues Over (Under) Expenditures	\$ 1,000
<i>Interfund Transfers:</i>	
Capital Reserve Fund Balance Appropriation	\$ -
Transfer from General Fund 10	\$ 50,000
Transfer to General Fund 10	\$ -
Transfer to Fund Balance Reserves	\$ (51,000)
Total Other Financing Sources (Uses):	\$ (1,000)
Total Revenues Over (Under) Expenditures and Other Financing Sources (Uses)	\$ -

PROPOSED

Town of Archer Lodge, North Carolina
ANNUAL BUDGET ORDINANCE
 Fiscal Year July 1, 2025 to June 30, 2026

Park Reserve Fund 31

	Amount
<i>Park Reserve Fund 31 Revenues:</i>	
Investment Earnings	2,000
Total Revenues	\$ 2,000
<i>Park Reserve Fund 31 Expenditures:</i>	
Recreation Development	-
Total Expenditures	\$ -
Revenues Over (Under) Expenditures	\$ 2,000
<i>Interfund Transfers:</i>	
Park Reserve Fund Balance Appropriation	\$ -
Transfer from General Fund 10	\$ 190,000
\$0.02 Tax/Fees-in-Lieu	
Transfer to General Fund 10	\$ (54,000)
Loan Payment	
Transfer to Fund Balance Reserves	\$ (138,000)
Total Other Financing Sources (Uses):	\$ (2,000)
Total Revenues Over (Under) Expenditures and Other Financing Sources (Uses)	\$ -

PROPOSED

Town of Archer Lodge, North Carolina
ANNUAL BUDGET ORDINANCE
 Fiscal Year July 1, 2025 to June 30, 2026

Public Safety Reserve Fund 32

	Amount
<i>Public Safety Reserve Fund 32 Revenues:</i>	
Investment Earnings	\$ 12,000
Total Revenues	\$ 12,000
<i>Public Safety Reserve Fund 32 Expenditures:</i>	
Public Safety Development	-
Total Expenditures	\$ -
Revenues Over (Under) Expenditures	\$ 12,000
<i>Interfund Transfers:</i>	
Public Safety Reserve Fund Balance Appropriation	\$ 283,000
Transfer from General Fund 10	\$ 50,000
Transfer to General Fund 10	\$ (345,000)
Total Other Financing Sources (Uses):	\$ (12,000)
Total Revenues Over (Under) Expenditures and Other Financing Sources (Uses)	\$ -

DULY ADOPTED THIS _____ DAY OF JUNE 2025

TOWN OF ARCHER LODGE

Matthew B. Mulhollem, Mayor

ATTEST:

Bryan R. Chadwick, Budget Officer

Jenny H. Martin, Town Clerk

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10 Revenues

	<u>Amount</u>
General Fund Revenues:	
Ad-Valorem Property Taxes	
Real and Personal Property Current Year Levy	\$ 2,000,000
Motor Vehicles Current Year Levy	205,000
Penalties and Interest	3,000
Total Ad-Valorem Property Taxes	2,208,000
State Sales Tax Distributions	432,000
Unrestricted Intergovernmental Revenues	
Franchise Taxes	174,500
Alcohol Beverage Tax	23,000
Johnston County ABC Profits	19,000
Total Unrestricted Intergovernmental Revenues	216,500
Restricted Intergovernmental Revenues	
PEG Media	82,200
Total Restricted Intergovernmental Revenues	82,200
Permits, Planning/Zoning Fees, Animal Control Fees	5,500
Parks and Recreation Fees/Rentals	90,000
Fee in Lieu of Recreation	54,000
Miscellaneous Revenues	5,500
Investment Earnings	40,000
Transfer in from Capital Reserve Fund	-
Transfer in from Park Reserve Fund	54,000
Transfer in from Public Safety Reserve Fund	345,000
Fund Balance Appropriated	-
<u>Total General Fund Revenues</u>	\$ 3,532,700

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10 Expenditures

General Fund Expenditures:

Amount

General Government

Governing Body

Salaries	16,000
FICA Taxes	1,300
Unemployment	100
Supplies	2,000
Election Expenses	5,000
Bereavement / Illness	500
Gasoline	300
Vehicle Maintenance	500
Travel	500
Training and Meetings	3,000
Town's Annual Event(s)	4,000
Annual Planning Session	1,000
Contracted Services	3,100
Legal Advertising	2,000
Dues and Subscriptions	16,250
Insurance - Workers Compensation	50
Small Equipment / Furnishings	2,000

Total Governing Body	57,600
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Administration

Salaries (Full-Time)	251,500
Salaries (Part-Time)	10,500
FICA Taxes	21,000
Retirement - NCLGERS	36,800
Medical/Dental/Vision insurance	29,200
NC 401-K	15,600
Unemployment Taxes	-
Employee Assistance Program (EAP)	50
Short Term Disability	600
Life Insurance	1,500
Professional Services (Audit)	20,000
Supplies	3,000
Bank Service Charges	100
Codification	6,000
Gasoline	300
Vehicle Maintenance	500
Travel	500
Training and Meetings	5,000

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10 Expenditures

General Fund Expenditures:	<u>Amount</u>
Postage	500
Social Media Services	10,300
Contracted Services	6,100
Contracted Services - Software	10,750
Dues and Subscriptions	5,700
Equipment Lease (Copier)	3,400
Insurance - Property & Liability	8,000
Insurance - Workers Compensation	400
Small Equipment / Furnishings	4,000
Capital Outlay	-
Total Administrative	451,300
Tax Collections	
Tax Collection Fees (NC & JoCo)	56,000
Total Tax Collections	56,000
Legal	
Attorney Fees	18,000
Total Legal	18,000
Property Tax	
Personal Property Tax - Leased Equipment	100
Total Property Tax	100
Public Buildings	
Professional Services	10,000
Supplies	5,000
Solid Waste/Garbage	6,500
Water & Sewer	3,900
LP Gas	3,000
Electricity	31,000
Communications	45,000
Contracted Services	35,500
Repairs & Maintenance - Buildings	8,000
Storm Water Repairs	1,000
Insurance - Property & Liability	12,000
Small Equipment & Furnishings	5,000
Capital Outlay	-

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10 Expenditures

General Fund Expenditures:	<u>Amount</u>
Veterans Memorial	4,000
Building Permits	5,000
<u>Total Public Buildings</u>	174,900
Video Programming	
PEG Media - EWTN	82,200
<u>Total General Government</u>	840,100
Public Safety	
Law Enforcement	
Contracted Services	345,000
<u>Total Law Enforcement</u>	345,000
Animal Control	
Supplies	500
Training & Meetings	500
Contracted Services - Town of Clayton	12,000
<u>Total Animal Control</u>	13,000
Fire Department	
North Side Fire & Rescue, Inc	950,300
<u>Total Fire Department</u>	950,300
<u>Total Public Safety</u>	1,308,300
Public Works	
Streets	
Supplies	1,000
Street Lights	11,600
Contracted Services	-
Repairs & Maintenance - Streets	1,000
Road Signs/Banners	12,000

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10 Expenditures

General Fund Expenditures:	<u>Amount</u>
Installation of Street Lights	3,000
<u>Total Public Works</u>	<u>28,600</u>
Planning & Zoning	
Salaries (Full-Time)	125,500
Salaries (Planning Board/Board of Adjustments Members)	11,350
FICA Taxes	11,000
Retirement - NCLGERS	18,400
Medical/Dental/Vision insurance	18,100
NC 401-K	7,800
Unemployment Taxes	200
Employee Assistance Program (EAP)	25
Short Term Disability	350
Life Insurance	800
Supplies	2,000
Gasoline	300
Vehicle Maintenance	300
Travel	500
Training and Meetings	6,000
Postage	300
Contracted Services	40,000
Contracted Services - Software	3,500
Code Enforcement Services	1,000
Dues & Subscriptions	1,505
Insurance - Workers compensation	200
Registering Documents @ Courthouse	100
Small Equipment / Furnishings	2,000
Capital Outlay	-
<u>Total Planning and Zoning</u>	<u>251,230</u>
Cultural and Recreation	
Parks and Recreation	
Salaries (Full-Time)	229,500
Salaries (Over-Time)	5,000
Salaries (Part-Time)	33,150
FICA Taxes	21,900
Retirement - NCLGERS	33,600
Medical/Dental/Vision insurance	35,600
NC 401-K	14,200

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

General Fund 10 Expenditures

General Fund Expenditures:	<u>Amount</u>
Unemployment Taxes	300
Employee Assistance Program (EAP)	50
Short Term Disability	700
Life Insurance	1,400
Supplies	3,500
Program Materials & Supplies	70,000
Uniforms	1,500
Gasoline	5,000
Vehicle Maintenance	1,000
Travel	1,500
Training and Meetings	9,000
Postage	100
Contracted Services	52,000
Repairs & Maintenance Equipment	5,000
Contracted Services - Software	1,600
Dues & Subscriptions	1,400
Equipment Lease	19,100
Insurance - Property & Liability	5,500
Insurance - Workers compensation	4,000
Small Equipment / Furnishings	6,000
Capital Outlay	-
<u>Total Cultural and Recreation</u>	<u>561,600</u>
Debt Service	
Principal - HR Software Module	6,900
Principal - P&R Software Module	4,650
Principal - Town Hall	\$ 100,000 Balance 33,335
Principal - Park Land	\$ 150,000 Balance 50,000
Principal - Expansion of Town Hall	\$ 270,000 Balance 27,000
Interest - Town Hall	2,275
Interest - Park Land	4,000
Interest - Expansion Town Hall	8,190
<u>Total Debt Service</u>	<u>136,350</u>
<u>Total Expenditures</u>	<u>3,126,180</u>

Town of Archer Lodge, North Carolina
Annual Budget Ordinance
For the Fiscal Year July 1, 2025 to June 30, 2026

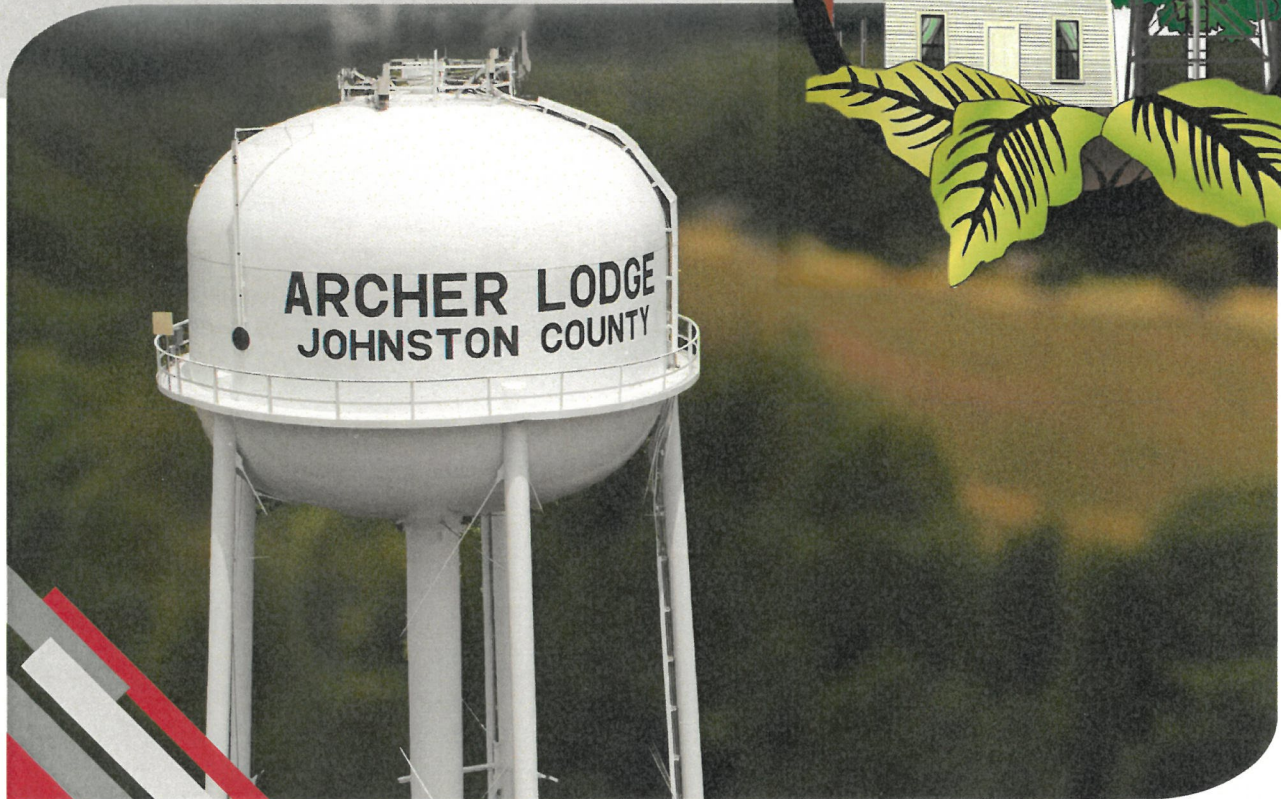
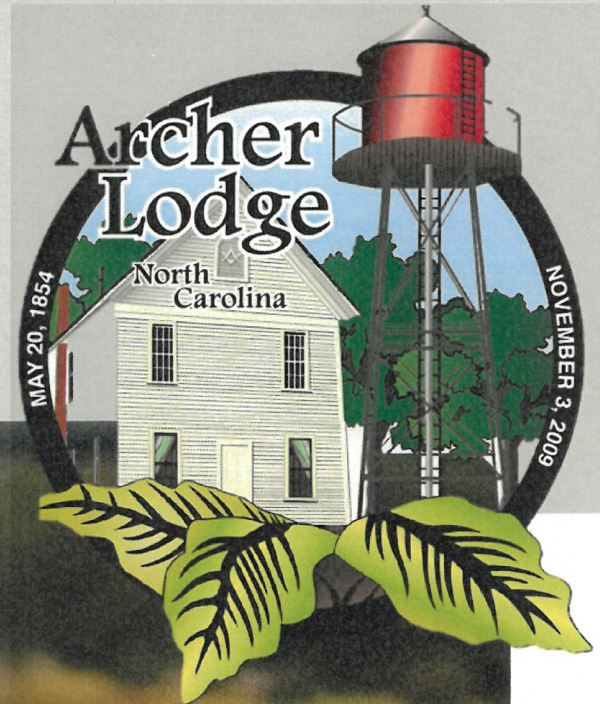
General Fund 10 Expenditures

General Fund Expenditures:	<u>Amount</u>
Interfund Transfers	
Transfer to Capital Reserve Fund 30	50,000
Transfer to Park Reserve Fund 31	190,000
Transfer to Public Safety Reserve Fund 32	50,000
Total Interfund Transfers	<u>290,000</u>
Transfer to Fund Balance Reserves	116,520
Total Interfund Transfers	<u>406,520</u>
<u>Total General Fund Expenditures and Interfund Transfers</u>	<u>\$ 3,532,700</u>

PROPOSED

PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



GENERAL FUND 10

Description Revenue Account Number	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	%PY		
	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year		Admin. Recmnd Anticipated	
2025 Property Taxes									
10-3125-0000	0.00	0.00	0.00	0.00	0.00		2,000,000.00	0.00	
	0.00	0.00	0.00	0.00	12.32	0.00			
Detail:	Real Property Assessments per Jo Co Tax Scroll 5/2/25, \$622,837,408 + Public Services, \$5,896,439 = \$628,733,847							2,000,000.00	0.00
	COMPUTATION: Total Assessments = \$628,733,847 / 100 * \$0.32 = \$0.02 - Park Reserve Fund \$0.16 - Town Operations (General Fund) \$0.14 - Fire Dept = \$0.32 Tax Rate Total Levy \$2,011,948								
2025 Vehicle Taxes									
10-3125-0120	0.00	0.00	0.00	0.00	0.00		205,000.00	0.00	
	0.00	0.00	0.00	0.00	0.00	0.00			
Detail:	NCMVT Assessments per TR-2-24 page 5a = \$67,417,216							205,000.00	0.00
	COMPUTATION: Total Assessments = \$67,417,216 / 100 * \$0.32 = \$0.02 - Park Reserve Fund \$0.16 - Town Operations (General Fund) \$0.14 - Fire Dept = \$0.32 Tax Rate Total Levy \$215,735								
Penalties and Interest									
10-3180-0000	2,000.00	2,000.00	3,000.00	3,000.00	3,000.00		3,000.00	0.00	
	1,893.76	2,743.50	3,111.23	3,354.41	3,133.88	0.00			
Local Option Sales Tax									
10-3200-0000	0.00	0.00	0.00	0.00	0.00			0.00	
	0.00	0.00	0.00	0.00	0.00	0.00			

Description Revenue Account Number	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	%PY
	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual Comments	Anticipated Actual	Estimated Full Year Admin. Recmnd	Anticipated
Article 39 1% Sales Tax							
10-3239-0000	115,000.00	132,000.00	138,000.00	162,000.00	170,000.00	185,000.00	0.00
	120,688.92	136,225.60	141,996.58	174,249.80	150,519.51	0.00	
Detail: NCLM Projections 2.8% Increase						185,000.00	0.00
Article 40 1/2% Sales Tax							
10-3240-0000	73,000.00	86,000.00	96,000.00	111,000.00	120,000.00	130,000.00	0.00
	76,240.78	89,127.89	98,788.26	120,741.31	103,377.62	0.00	
Detail: NCLM Projections 2.8% Increase						130,000.00	0.00
Article 42 1/2% Sales Tax							
10-3242-0000	60,000.00	68,000.00	72,000.00	88,000.00	89,000.00	95,000.00	0.00
	62,855.89	71,150.95	74,726.03	92,074.43	79,767.34	0.00	
Detail: NCLM Projections 2.8% Increase						95,000.00	0.00
Article 44 1/2% Sales Tax							
10-3244-0000	10.00	0.00	5.00	0.00	0.00		0.00
	7.42-	3.84-	4.30	0.00	0.29	0.00	
Article 44 NCGS 105-524 Sales Tax							
10-3244-0524	12,500.00	15,500.00	16,000.00	21,000.00	20,000.00	22,000.00	0.00
	14,156.13	15,629.12	17,790.89	22,556.63	19,309.50	0.00	
Detail: NCLM Projections 2.8% Increase						22,000.00	0.00
Alcohol Beverage Tax							
10-3322-0000	22,000.00	19,250.00	22,800.00	25,000.00	22,000.00	23,000.00	0.00
	21,951.94	19,193.11	22,765.90	25,110.97	0.00	0.00	
Detail: NCLM Projections 2.6% Increase						23,000.00	0.00
Electric Franchise Tax							
10-3324-0000	115,000.00	110,000.00	125,000.00	115,000.00	133,000.00	150,000.00	0.00
	115,186.99	117,039.50	120,796.13	138,738.40	75,150.58	0.00	
Detail: NCLM Projections 6.3% Increase						150,000.00	0.00

Description Revenue Account Number	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	%PY
	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual Comments	Anticipated Actual	Estimated Full Year	Admin. Recmnd Anticipated
Telecommunications Franchise							
10-3325-0000	30,000.00	19,000.00	20,000.00	18,000.00	18,000.00		16,000.00
	29,724.08	19,853.60	20,767.12	19,815.45	9,481.03	0.00	
Detail: NCLM Projections 6.6% Decrease							16,000.00
							0.00
ABC Profits Johnston Co.							
10-3337-0000	35,000.00	22,000.00	20,000.00	15,000.00	20,000.00		19,000.00
	33,621.38	22,775.80	14,647.51	21,860.85	9,504.72	0.00	
Permits and Fees							
10-3340-0000	9,000.00	8,000.00	7,000.00	5,000.00	5,000.00		5,000.00
	8,785.00	8,735.00	5,000.00	11,465.00	6,375.00	0.00	
Fee in Lieu of Recreation							
10-3345-0000	40,000.00	3,000.00	78,000.00	78,000.00	54,000.00		54,000.00
	40,000.00	0.00	0.00	0.00	0.00	0.00	
Detail: 36 Lots @ \$1,500 Subdivision approved/Castleberry Rd							54,000.00
							0.00
Animal Control Fees							
10-3348-0000	140.00	100.00	1,500.00	1,000.00	500.00		500.00
	25.00	100.00	1,700.00	305.00	300.00	0.00	
Parks & Recreation Fees							
10-3350-0000	0.00	0.00	1,000.00	62,000.00	70,000.00		75,000.00
	0.00	0.00	955.00	61,910.00	70,470.00	0.00	
Detail: Programs/Activities							75,000.00
							0.00
Parks & Recreation Rentals							
10-3351-0000	0.00	0.00	0.00	12,000.00	20,000.00		15,000.00
	0.00	0.00	0.00	12,743.20	10,639.75	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	Admin. Recmnd	Anticipated	%PY	
Revenue Account Number	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year				
	Comments									
Cable TV Franchise Fees										
10-3361-0000	12,200.00	11,000.00	10,000.00	10,000.00	9,000.00		8,500.00		0.00	
	12,044.02	10,961.88	10,427.80	9,671.33	4,747.26	0.00				
Detail:	NCLM Projections 4.4% Decrease						8,500.00	0.00		
Restricted Intergovernmental										
10-3400-0000	0.00	0.00	0.00	0.00	0.00				0.00	
	0.00	0.00	0.00	0.00	0.00	0.00				
PEG Channel Support										
10-3461-0000	53,000.00	52,250.00	51,500.00	51,500.00	60,000.00		82,200.00		0.00	
	52,901.22	51,616.12	51,282.08	51,612.88	39,701.25	0.00				
Detail:	Per Expenditure Acct# 10-4200-3500 \$6,850/Channel * 3 channels = \$20,550/qtr						82,200.00	0.00		
Miscellaneous Revenues										
10-3800-0000	100.00	100.00	4,000.00	6,500.00	5,000.00		5,000.00		0.00	
	20.53	15.27	3,636.12	5,445.95	7,643.50	0.00				
Veterans Brick Revenues										
10-3830-0000	0.00	0.00	500.00	1,000.00	500.00		500.00		0.00	
	0.00	0.00	355.00	555.00	530.00	0.00				
Investment Earnings										
10-3831-0000	4,000.00	4,500.00	55,000.00	70,000.00	60,000.00		40,000.00		0.00	
	4,280.56	5,313.46	57,828.68	68,128.72	35,729.79	0.00				
Transfer from Capital Reserve Fund 30										
10-3900-3930	0.00	154,250.00	291,600.00	125,000.00	0.00				0.00	
	0.00	154,250.00	291,600.00	125,000.00	0.00	0.00				

Description	2021	2022	2023	2024	***** 2025	*****	***** 2026	*****	*****
Revenue Account Number	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year	Admin. Recmnd	Anticipated	%PY
	Comments								
Transfer from Park Reserve Fund 31									
10-3900-3931	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00		54,000.00		0.00
	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00	0.00			
Detail: Make Annual Loan Payment to George Smith Family							54,000.00	0.00	
	*Final payment of \$52,000 will be 8/20/26 (FY26/27)								
Transfer from Public Safety Res Fnd 32									
10-3900-3932	0.00	0.00	200,000.00	200,000.00	250,000.00		345,000.00		0.00
	0.00	0.00	0.00	0.00	0.00	0.00			
Detail: Reimbursing Jo Co Sheriff's Dept							345,000.00	0.00	
	2 - Deputy Sheriff (12 hr day/7 day wk + benefits/\$96,000 each = \$192,000)								
	2 - Uniforms, Vest, Badges & Equipment, New Hire Costs (\$15,000/each = \$30,000)								
	2 - Patrol Vehicles, Equipment, Tires, Maintenance \$56,000/each = \$112,000								
	2 - Vehicle Fuel \$5,000/ea = \$10,000								
	FIRST YEAR - MORE EXPENSIVE								
	RECURRING EXPENSES - SALARIES, BENEFITS, UNIFORMS, PHONE, TRAINING SUPPLIES, VEHICLE INSURANCE, & FUEL								
	See General Fund 10, Public Safety Contracted Services Expenditure Acct Code: 10-4300-3525								
Fund Balance Appropriated									
10-3990-0000	0.00	0.00	240,000.00	500,000.00	353,955.00				0.00

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Revenue Account Number	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year	Admin. Recmnd	Anticipated	%PY
	Comments								
	0.00	0.00	0.00	0.00	0.00	0.00			
Revenue Fund Total	646,950.00 658,368.78	768,950.00 786,726.96	1,512,905.00 998,178.63	1,738,000.00 1,023,339.33	1,538,955.00 682,393.34		3,532,700.00	0.00	0.00
Year Total	646,950.00 658,368.78	768,950.00 786,726.96	1,512,905.00 998,178.63	1,738,000.00 1,023,339.33	1,538,955.00 682,393.34		3,532,700.00	0.00	0.00

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Governing Body:										
10-4110-0000	45,629.50 31,315.74	51,465.00 43,362.55	43,105.00 31,831.15	56,615.00 48,914.98	58,300.00 31,350.66		57,600.00	57,600.00	0.00	0.00
Administration:										
10-4120-0000	254,985.00 229,222.30	299,710.00 246,492.57	338,060.00 319,186.64	409,450.00 388,338.46	465,350.00 350,628.28		451,300.00	451,300.00	0.00	0.00
Tax Collections Fees:										
10-4140-0000	26,000.00 22,767.71	26,000.00 23,387.77	30,000.00 29,531.81	36,000.00 33,901.02	37,000.00 33,949.91		56,000.00	56,000.00	0.00	0.00
Legal:										
10-4150-0000	15,500.00 14,643.75	15,000.00 16,617.50	18,000.00 15,450.00	18,000.00 13,600.00	18,000.00 11,078.77		18,000.00	18,000.00	0.00	0.00
Property Tax:										
10-4170-0000	100.00 37.45	100.00 24.97	100.00 12.48	100.00 3.12	100.00 62.64		100.00	100.00	0.00	0.00
Public Buildings:										
10-4190-0000	59,100.00 43,220.32	50,700.00 39,178.36	104,580.00 97,887.47	550,589.00 511,976.65	161,960.00 129,524.18		174,900.00	174,900.00	0.00	0.00
PEG Media Partners - EWT										
10-4200-3500	53,000.00 52,901.22	52,250.00 51,616.12	51,500.00 51,282.08	51,500.00 51,612.88	60,000.00 39,701.25		82,200.00	82,200.00	0.00	0.00
Public Safety:										
10-4300-0000	350,500.00 350,099.93	375,500.00 359,829.43	578,700.00 375,857.48	712,000.00 518,505.24	852,250.00 575,415.20		1,308,300.00	1,308,300.00	0.00	0.00
Public Works:										
10-4510-0000	23,250.00 12,092.22	30,600.00 17,200.63	28,500.00 22,624.45	27,000.00 19,798.39	23,000.00 16,221.86		28,600.00	28,600.00	0.00	0.00
Planning/Zoning:										
10-4910-0000	152,067.00 138,048.11	174,295.00 108,839.73	198,930.00 165,399.36	253,100.00 212,332.47	236,475.00 165,112.96		251,230.00	251,230.00	0.00	0.00

Description Budget Account Number	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year	Requested	Admin. Recmnd	Budgeted	%PY
Parks & Recreation:										
10-6120-0000	55,000.00	42,100.00	759,490.00	519,250.00	547,990.00		561,600.00	561,600.00	0.00	0.00
	55,500.00	40,338.22	716,335.81	484,170.11	433,225.78	0.00				
Debt Service & Fees:										
10-9110-0000	145,069.00	140,985.00	136,940.00	132,896.00	140,125.00		136,350.00	136,350.00	0.00	0.00
	145,061.00	140,982.04	145,932.96	132,883.92	140,109.78	0.00				
Transfer to Capital Reserve Fund 30										
10-9900-0030	50,000.00	25,000.00	0.00	0.00	0.00		50,000.00	50,000.00	0.00	0.00
	50,000.00	25,000.00	0.00	0.00	0.00	0.00				
Transfer to Park Reserve Fund 31										
10-9900-0031	156,000.00	123,000.00	160,000.00	162,000.00	139,000.00		190,000.00	190,000.00	0.00	0.00
	155,444.52	119,163.27	85,205.64	86,623.42	81,660.15	0.00				
Transfer to Public Safety Reserve Fnd 32										
10-9900-0032	50,000.00	25,000.00	0.00	0.00	0.00		50,000.00	50,000.00	0.00	0.00
	50,000.00	25,000.00	0.00	0.00	0.00	0.00				
Transfer to Fund Balance										
10-9990-0000	0.00	0.00	0.00	0.00	0.00		116,520.00	116,520.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Totals	1,436,200.50	1,431,705.00	2,447,905.00	2,928,500.00	2,739,550.00		3,532,700.00	3,532,700.00	0.00	0.00
	1,350,354.27	1,257,033.16	2,056,537.33	2,502,660.66	2,008,041.42	0.00				

Range of Expend Accounts: 10-0000-0000 to 10-9999-9999
 Range of Revenue Accounts: 10-0000-0000 to 10-9999-9999
 For Budget: %PY = ((Budgeted / (Appropriated + Transfers)) - 1) * 100

For Revenue: %PY = ((2026 Anticipated / 2025 Anticipated) - 1) * 100

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Governing Body:										
10-4110-0000										
Payroll Expenses										
10-4110-1000	0.00	0.00	0.00	0.00	0.00					0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Salaries										
10-4110-1210	12,300.00	12,300.00	12,300.00	16,000.00	16,000.00		16,000.00	16,000.00		0.00
	10,500.00	10,500.00	10,500.00	16,800.00	11,525.00	0.00				
Detail:										
Mayor (\$300/month)							3,600.00	3,600.00	0.00	
Mayor Pro Tem (\$225/month)							2,700.00	2,700.00	0.00	
Council Members (4 Members @ \$200/month)							9,600.00	9,600.00	0.00	
Extra Rounding							100.00	100.00	0.00	
FICA Tax										
10-4110-1810	1,000.00	1,000.00	1,000.00	1,300.00	1,300.00		1,300.00	1,300.00		0.00
	803.32	803.32	803.32	1,285.21	881.67	0.00				
Detail:										
7.65% of salaries (Figured 8% of \$16K)							1,280.00	1,280.00	0.00	
Extra Rounding							20.00	20.00	0.00	
Unemployment										
10-4110-1850	0.00	0.00	0.00	100.00	100.00		100.00	100.00		0.00
	0.00	0.00	0.00	50.00	0.00	0.00				
Supplies										
10-4110-2000	2,000.00	2,000.00	2,000.00	2,500.00	2,000.00		2,000.00	2,000.00		0.00
	867.63	1,509.51	1,630.50	1,348.35	2,439.58	0.00				

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY	
Department: 10-4110-0000 Governing Body:											
Election Expenses											
10-4110-2500	1,600.00 0.00	5,000.00 3,433.10	1,000.00 0.00	5,000.00 3,743.51	5,000.00 0.00		5,000.00	5,000.00	_____	0.00	
Bereavement/Illness Expenses											
10-4110-2600	200.00 178.89	500.00 244.19	500.00 0.00	1,000.00 372.56	1,000.00 38.98		500.00	500.00	_____	0.00	
Gasoline											
10-4110-3000	250.00 0.00	250.00 0.00	250.00 0.00	200.00 138.17	300.00 32.67		300.00	300.00	_____	0.00	
Vehicle Maintenance											
10-4110-3050	200.00 71.23	200.00 0.00	200.00 72.89	500.00 0.00	500.00 0.00		500.00	500.00	_____	0.00	
Travel											
10-4110-3100	1,000.00 0.00	1,000.00 0.00	1,000.00 0.00	1,000.00 0.00	500.00 0.00		500.00	500.00	_____	0.00	
Training & Meetings											
10-4110-3110	2,000.00 769.00	2,000.00 2,130.90	2,000.00 1,895.16	3,000.00 2,379.84	3,000.00 1,820.90		3,000.00	3,000.00	_____	0.00	
Town's Annual Events											
10-4110-3160	5,000.00 2,677.84	7,000.00 3,596.04	1,000.00 550.00	1,000.00 970.00	4,500.00 800.00		4,000.00	4,000.00	_____	0.00	
Detail:	Shredding Event/Food Truck - Fall & Spring (\$800/each)							1,600.00	1,600.00	0.00	
	Outdoor Entertainment - Band (Fall or Spring)							2,400.00	2,400.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	
Department: 10-4110-0000 Governing Body:										
Annual Planning Session										
10-4110-3200	1,000.00	500.00	1,000.00	1,000.00	1,000.00		1,000.00	1,000.00		0.00
	238.49	291.62	763.10	660.80	195.50	0.00				
Contracted Services										
10-4110-3500	2,300.00	2,300.00	2,500.00	2,100.00	2,800.00		3,100.00	3,100.00		0.00
	1,409.86	1,412.01	1,260.00	2,151.00	2,322.60	0.00				
Detail: VC3 Archiving Emails (6 @ \$55/each)							330.00	330.00	0.00	
Lightwire:							2,050.00	2,050.00	0.00	
RMM-Remote Monitor/Malware										
Council Chambers & Mayor's Office										
(\$26/Computer/12 mos)*2 Computers = \$624										
Office 365 Backup										
\$26/12 mos = \$312										
LightMail										
6 Gov Body Email Accounts (\$15/mo/ea * 12 mos) = \$1,080										
Total \$2,016; Budgeted Amt \$2,050										
Christmas Float (Triangle Floats)							650.00	650.00	0.00	
Extra Rounding							70.00	70.00	0.00	
Legal Advertising										
10-4110-3700	1,500.00	2,000.00	4,000.00	3,000.00	3,000.00		2,000.00	2,000.00		0.00
	966.76	3,216.50	2,049.62	559.00	549.60	0.00				
Dues and Subscriptions										
10-4110-4000	13,209.50	13,350.00	13,800.00	13,815.00	15,250.00		16,250.00	16,250.00		0.00
	11,118.72	14,636.43	11,663.13	13,890.54	10,702.16	0.00				
Detail: Triangle East Chamber (Enterprise)							500.00	500.00	0.00	
CAMPO							4,500.00	4,500.00	0.00	
Central Pines (formerly TJCOG)							2,500.00	2,500.00	0.00	
NCLM							7,200.00	7,200.00	0.00	
UNC SOG Foundation							1,000.00	1,000.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2027 *****	***** 2028 *****	***** 2029 *****	***** 2030 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4110-0000	Governing Body:									
Amazon Business Prime \$200/yr / 4 departments = \$50							50.00	50.00	0.00	
Jo Co Mayor's Association							500.00	500.00	0.00	
Insurance Workers Compensation										
10-4110-4550	70.00	65.00	55.00	100.00	50.00		50.00	50.00	0.00	0.00
	66.00	57.00	55.00	51.00	42.00	0.00				
Detail: See WComp Salary Worksheet - Kim							50.00	50.00	0.00	
Small Equipment & Furnishings										
10-4110-5000	2,000.00	2,000.00	500.00	5,000.00	2,000.00		2,000.00	2,000.00	0.00	0.00
	1,648.00	1,531.93	588.43	4,515.00	0.00	0.00				
Control Total	45,629.50	51,465.00	43,105.00	56,615.00	58,300.00		57,600.00	57,600.00	0.00	0.00
	31,315.74	43,362.55	31,831.15	48,914.98	31,350.66	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4120-0000	Administration:									
Administration: 10-4120-0000										
Payroll Expenses										
10-4120-1000	0.00	0.00	0.00	0.00	0.00					0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Salaries (Full-Time)										
10-4120-1210	109,000.00	137,285.00	163,000.00	230,000.00	260,000.00		251,500.00	251,500.00		0.00
	107,486.30	109,578.40	160,970.59	226,584.19	206,099.12	0.00				
Detail: 2% Adjustment & 2% Merit + Longevity (70%)							251,300.00	251,300.00	0.00	
\$81,900 - TA										
\$74,200 - ATA/FO										
\$60,200 - HRO/TC										
\$35,000 - DC										
Rounding							200.00	200.00	0.00	
Salaries (Part-Time)										
10-4120-1220	36,000.00	36,000.00	30,000.00	0.00	20,000.00		10,500.00	10,500.00		0.00
	29,183.06	35,578.00	29,681.38	0.00	4,206.92	0.00				
Detail: Executive Assistant (EA) 70%							10,500.00	10,500.00	0.00	
FICA Tax										
10-4120-1810	12,000.00	14,700.00	15,500.00	18,500.00	22,400.00		21,000.00	21,000.00		0.00
	10,541.21	12,143.20	14,653.61	17,435.61	16,212.14	0.00				
Detail: 7.65% of Salaries - \$262,000 (Figured 8%)							20,960.00	20,960.00	0.00	
Rounding							40.00	40.00	0.00	
Retirement										

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Department: 10-4120-0000 Administration:											
10-4120-1820	16,000.00	22,500.00	24,500.00	32,500.00	36,800.00		36,800.00	36,800.00		0.00	
	14,828.59	17,505.88	24,498.51	30,838.10	28,379.78	0.00					
Detail: New 14.48% of Full-Time Salaries - \$251,500 (Figured 14.6%) Rounding							36,719.00	36,719.00	0.00		
							81.00	81.00	0.00		
Medical											
10-4120-1830	14,000.00	16,700.00	19,400.00	26,000.00	29,000.00		29,200.00	29,200.00		0.00	
	12,099.12	12,364.38	17,240.14	22,768.38	21,145.92	0.00					
Detail: State Health Plan (Aetna) - \$800/mo Vision - \$15.50/mo Dental - \$42/mo Total - \$857.50 * 12 Months = \$10,290 @ 70%							28,812.00	28,812.00	0.00		
\$7,203 - TA, ATA/FO, HRO/TC , DC Rounding							388.00	388.00	0.00		
NC 401-K											
10-4120-1840	7,000.00	9,100.00	13,200.00	19,000.00	21,200.00		15,600.00	15,600.00		0.00	
	6,449.08	6,574.88	12,877.77	18,127.18	16,488.14	0.00					
Detail: 6% of Full-Time Salaries - \$251,500 (Figured 6.15%) Rounding							15,467.00	15,467.00	0.00		
							133.00	133.00	0.00		
Unemployment											
10-4120-1850	550.00	250.00	250.00	300.00	300.00					0.00	
	450.00	0.00	0.00	300.00	0.00	0.00					
Employee Assistance Program (EAP)											
10-4120-1860	0.00	0.00	0.00	50.00	50.00		50.00	50.00		0.00	
	0.00	0.00	0.00	35.58	28.73	0.00					
Detail: \$14/employee/year @ 70%							40.00	40.00	0.00		

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	
Department: 10-4120-0000 Administration:										
TA, ATA/FO, HRO/TC, DC Rounding							10.00	10.00	0.00	
Short Term Disability										
10-4120-1880	275.00	320.00	400.00	500.00	540.00		600.00	600.00	0.00	
	230.40	234.00	336.15	436.80	382.20	0.00				
Detail: \$16 * 12 mos = \$192 @ 70%							540.00	540.00	0.00	
\$135 - TA, ATA/FO, HRO/TC , DC Rounding							60.00	60.00	0.00	
Life Insurance										
10-4120-1890	575.00	900.00	1,000.00	1,400.00	1,560.00		1,500.00	1,500.00	0.00	
	489.23	599.04	882.09	1,245.37	1,129.25	0.00				
Detail: Life Insurance is computed (1.5 x Salary)/1,000 x \$0.32 = monthly premium @ 12 mos							1,462.00	1,462.00	0.00	
70%: \$56 - TA \$51 - ATA/FO \$42 - HRO/TC \$25 - DC Rounding							38.00	38.00	0.00	
Professional & Consulting Fees										
10-4120-1900	11,000.00	11,000.00	12,000.00	18,000.00	18,000.00		20,000.00	20,000.00	0.00	
	10,500.00	10,500.00	10,500.00	18,000.00	14,500.00	0.00				
Detail: Auditors - May & Place, PA (5 year contract FY2020 thru FY2024)							20,000.00	20,000.00	0.00	
Supplies-Town Hall										
10-4120-2000	2,500.00	3,000.00	3,000.00	3,000.00	2,500.00		3,000.00	3,000.00	0.00	

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4120-0000 Administration:										
Detail: Office Supplies	1,446.29	1,196.45	2,435.22	2,203.83	3,291.16	0.00				
Service Awards							2,800.00	2,800.00	0.00	
							200.00	200.00	0.00	
Bank Service Charge										
10-4120-2250	100.00	100.00	100.00	100.00	100.00		100.00	100.00		0.00
	0.00	0.00	0.00	19.41	0.00	0.00				
Codification										
10-4120-2700	10,000.00	12,225.00	4,500.00	5,200.00	6,000.00		6,000.00	6,000.00		0.00
	7,780.81	11,044.57	4,308.00	4,983.50	5,232.67	0.00				
Detail: Municode Powered by CIVICPLUS							6,000.00	6,000.00	0.00	
Codification										
* Annual Full Supplement Subscription										
\$4,500										
* Online Code Hosting & OrdLink										
Subscription \$1,500										
Gasoline										
10-4120-3000	250.00	250.00	250.00	500.00	300.00		300.00	300.00		0.00
	190.68	206.89	311.04	131.89	16.05	0.00				
Vehicle Maintenance										
10-4120-3050	200.00	200.00	200.00	500.00	500.00		500.00	500.00		0.00
	83.24	43.00	89.40	12.98	304.89	0.00				
Travel										
10-4120-3100	500.00	500.00	1,500.00	800.00	500.00		500.00	500.00		0.00
	0.00	0.00	1,338.44	691.53	102.90	0.00				
Training & Meetings										

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted		
Department: 10-4120-0000 Administration:											
10-4120-3110	2,750.00	3,000.00	7,000.00	8,000.00	5,000.00		5,000.00	5,000.00			0.00
	1,674.62	489.25	6,372.69	4,256.48	2,126.52	0.00					
Detail: TA, ATA/FO, HRO/TC, DC @ 70%							5,000.00	5,000.00	0.00		
Postage											
10-4120-3250	500.00	500.00	500.00	500.00	500.00		500.00	500.00			0.00
	187.15	236.26	412.09	298.63	979.39	0.00					
Social Media Services											
10-4120-3360	3,100.00	3,200.00	4,200.00	5,500.00	5,700.00		10,300.00	10,300.00			0.00
	2,888.00	2,980.04	4,076.00	5,291.00	5,515.40	0.00					
Detail: Archive Social (annual)							4,800.00	4,800.00	0.00		
Website Hosting - EvoGov (annual)							600.00	600.00	0.00		
Website AccessiBe (ADA Compliant) - EvoGov (annual)							600.00	600.00	0.00		
Website Update (balance)							4,300.00	4,300.00	0.00		
Contracted Services											
10-4120-3500	8,900.00	5,500.00	4,700.00	4,600.00	4,800.00		6,100.00	6,100.00			0.00
	7,741.66	4,993.22	3,627.50	3,990.00	3,589.10	0.00					
Detail: Lightwire, Inc (\$218/mo - NaaS-Network as a Service)							2,616.00	2,616.00	0.00		
TRM - incidentals							500.00	500.00	0.00		
VC3 Archiving Emails (4 @ \$55/each)							220.00	220.00	0.00		
Lightwire:							2,700.00	2,700.00	0.00		
RMM-Remote Monitor/Malware											
TA, ATA/FO, ATA/FO Laptop, HRO/TC, DC (5 @ \$26/mo/ea * 12 months = \$1,560 @ 70%) = \$1,092											
ExecAsst (EA) (1 @ \$26/mo * 12 months = \$312 @ 50%) = \$156											
Office 365 Backup											

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Department: 10-4120-0000 Administration:											
	\$26 * 12 mos = \$312										
	LightMail+										
	TA, ATA/FO, HRO/TC, DC,										
	(4 @ \$26/mo/ea * 12 months = \$1,248 @										
	70%) = \$874										
	EA										
	(\$26/mo * 12 months = \$312 @ 50%) = \$156										
	Total \$2,590; Budgeted \$2,700										
	Rounding							64.00	64.00	0.00	
Contracted Services-Software											
10-4120-3600	6,000.00	8,800.00	17,000.00	15,500.00	10,800.00		10,750.00	10,750.00		0.00	
	5,364.15	8,599.34	10,135.31	14,832.14	9,849.74	0.00					
Detail:	Edmunds GovTech (\$5,250 Total, Cloud							2,625.00	2,625.00		0.00
	Hosting-Level1) 50%										
	Diligent Corp (iCompass-Mtgs &							4,500.00	4,500.00		0.00
	Minutes-Clerk)										
	Edmunds GovTech (Finance)							2,500.00	2,500.00		0.00
	Adobe Pro License							1,050.00	1,050.00		0.00
	TA, ATA/FO, HRO/TC, DC, EA										
	(5 @ \$300/yr = \$1,500 @ 70%) = \$1,050.00										
	Rounding							75.00	75.00	0.00	
Dues & Subscriptions											
10-4120-4000	2,000.00	1,650.00	2,000.00	4,500.00	5,500.00		5,700.00	5,700.00		0.00	
	1,410.83	926.66	1,938.54	4,131.43	3,480.97	0.00					
Detail:	TownofArcherLodge.com Domain							50.00	50.00		0.00
	Government Finance Officers Assoc (GFOA)							170.00	170.00		0.00
	.Gov Domain - FREE							0.00	0.00		0.00
	NC Municipal Clerk's Assoc (NCAMC) 2 @							200.00	200.00		0.00
	\$100 each (Clerk)										
	International Institute of Municipal							350.00	350.00		0.00
	Clerks Assoc (IIMC) 2 for \$190 + \$155 +										
	\$5										

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4120-0000 Administration:										
NC Government Finance Officers Assoc (NCGFOA)							100.00	100.00	0.00	
Amazon Business Prime \$180/yr / 4 departments = \$45							45.00	45.00	0.00	
Catapult							2,750.00	2,750.00	0.00	
Society for Human Resource Management (SHRM)							265.00	265.00	0.00	
Organization for Municipal Personnel Officers (OMPO)							50.00	50.00	0.00	
Public Sector HR Association (PSHRA, formerly IPMA-HR)							175.00	175.00	0.00	
NC Public Sector HR Association (NC Chapter)							50.00	50.00	0.00	
International City/County Management Assoc (ICMA)							750.00	750.00	0.00	
UNC SOG Alumni Assoc of NC Municipal/County Assoc (AANCMCA)-2 @ \$50							100.00	100.00	0.00	
BChadwick/KBatten										
NC City & County Management Assoc (NCCCMCA)-							500.00	500.00	0.00	
BChadwick/KBatten										
Extra Rounding							145.00	145.00	0.00	
Equipment Lease										
10-4120-4200	4,300.00	3,600.00	3,600.00	4,800.00	3,400.00		3,400.00	3,400.00		0.00
	3,042.00	2,451.09	2,602.15	2,497.84	1,829.49	0.00				
Detail: Main Copier							3,120.00	3,120.00	0.00	
Alford Leasing \$110/mo - Lease										
\$150/mo - Overage										
Extra Rounding							280.00	280.00	0.00	
Insurance Property & Liability										
10-4120-4500	5,100.00	6,000.00	5,550.00	5,100.00	5,500.00		8,000.00	8,000.00		0.00
	4,571.88	4,917.10	5,303.17	4,893.16	4,928.56	0.00				
Detail: NCLM Prop & Liability Proposal Summary							8,000.00	8,000.00	0.00	
Gen Liab = \$2,500										

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4120-0000	Administration:									
Public Officials Liab = \$3,500										
Crime Coverage = \$1,500										
Auto-Jeep = \$500										
Total Budgeted = \$8,000										
Insurance Workers Compensation										
10-4120-4550	385.00	430.00	510.00	600.00	400.00		400.00	400.00		0.00
	384.00	400.00	510.47	567.24	338.66	0.00				
Detail: See WComp Salary Worksheet - Kim							400.00	400.00	0.00	
Small Equipment & Furnishings										
10-4120-5000	2,000.00	2,000.00	4,200.00	4,000.00	4,000.00		4,000.00	4,000.00		0.00
	200.00	2,930.92	4,086.38	3,766.19	470.58	0.00				
Control Total	254,985.00	299,710.00	338,060.00	409,450.00	465,350.00		451,300.00	451,300.00	0.00	0.00
	229,222.30	246,492.57	319,186.64	388,338.46	350,628.28	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4140-0000	Tax Collections Fees:									
Tax Collections Fees:										
10-4140-0000										
Jo Co Tax Collections										
10-4140-4950	26,000.00	26,000.00	30,000.00	36,000.00	37,000.00		56,000.00	56,000.00		0.00
	22,767.71	23,387.77	29,531.81	33,901.02	33,949.91	0.00				
Detail: Adval, NCDMV and P&I							55,700.00	55,700.00	0.00	
(5/2/25 tax scroll) = \$2,227,693										
\$2,228,000 @ 2.5% = \$55,700										
Rounding							300.00	300.00	0.00	
Control Total	26,000.00	26,000.00	30,000.00	36,000.00	37,000.00		56,000.00	56,000.00	0.00	0.00
	22,767.71	23,387.77	29,531.81	33,901.02	33,949.91	0.00				

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4150-0000	Legal:									
Legal: 10-4150-0000										
Legal - Attorney Fees										
10-4150-1920	15,500.00	15,000.00	18,000.00	18,000.00	18,000.00		18,000.00	18,000.00		0.00
	14,643.75	16,617.50	15,450.00	13,600.00	11,078.77	0.00				
Detail: Retainer \$215 @ 12 months							2,580.00	2,580.00	0.00	
Services (Town Council/Planning Board/Staff)							15,420.00	15,420.00	0.00	
Control Total	15,500.00	15,000.00	18,000.00	18,000.00	18,000.00		18,000.00	18,000.00	0.00	0.00
	14,643.75	16,617.50	15,450.00	13,600.00	11,078.77	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****				%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	
Department: 10-4170-0000	Property Tax:									
Property Tax:										
10-4170-0000										
Personal Property Tax										
10-4170-1000	100.00	100.00	100.00	100.00	100.00		100.00	100.00		0.00
	37.45	24.97	12.48	3.12	62.64	0.00				
Detail: Property Tax on CEI Copier							100.00	100.00	0.00	
Control Total	100.00	100.00	100.00	100.00	100.00		100.00	100.00	0.00	0.00
	37.45	24.97	12.48	3.12	62.64	0.00				

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4190-0000 Public Buildings:										
Public Buildings:										
10-4190-0000										
Professional Services										
10-4190-1900	5,000.00	1,000.00	5,000.00	10,000.00	10,000.00		10,000.00	10,000.00		0.00
	3,187.67	0.00	1,650.00	5,500.00	0.00	0.00				
Detail: Professional Services							10,000.00	10,000.00	0.00	
Supplies-Buildings										
10-4190-2000	3,000.00	2,000.00	3,000.00	13,289.00	3,000.00		5,000.00	5,000.00		0.00
	1,527.03	1,517.24	2,726.95	12,637.88	2,694.20	0.00				
Detail: All Town Facilities/Property							5,000.00	5,000.00	0.00	
Solid Waste/Garbage										
10-4190-3300	0.00	0.00	0.00	6,000.00	6,000.00		6,500.00	6,500.00		0.00
	0.00	0.00	0.00	5,800.08	5,327.37	0.00				
Detail: Town Hall & ALCC Dumpster							6,500.00	6,500.00	0.00	
Water & Sewer										
10-4190-3310	500.00	400.00	1,000.00	4,000.00	3,700.00		3,900.00	3,900.00		0.00
	309.70	292.65	405.25	1,683.70	1,393.65	0.00				
Detail: JoCo Public Utilities (\$45/mo) - Town Hall							540.00	540.00	0.00	
Detail: JoCo Public Utilities (\$150/mo) - Park Restroom Facilities							1,800.00	1,800.00	0.00	
Detail: JoCo Public Utilities - ALCC Baseball Field & Restrooms							1,500.00	1,500.00	0.00	
Detail: Extra Rounding							60.00	60.00	0.00	
LP Gas										
10-4190-3320	2,000.00	2,000.00	2,000.00	3,000.00	2,500.00		3,000.00	3,000.00		0.00
	1,633.53	1,917.71	1,885.95	1,305.94	2,752.24	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	
Department: 10-4190-0000 Public Buildings:										
Detail: Dean's - All Town Bldgs							3,000.00	3,000.00	0.00	
Electric										
10-4190-3330	6,000.00	6,200.00	8,500.00	25,000.00	32,000.00		31,000.00	31,000.00	0.00	
	4,629.98	4,913.66	7,448.33	26,344.34	18,478.66	0.00				
Detail: Town Hall & Event Pole (\$550/mo)							6,600.00	6,600.00	0.00	
Town Park-both Bldgs (\$1,100/mo)							13,200.00	13,200.00	0.00	
ALCC Ballfield, Picnic Shelter & Taxes							10,800.00	10,800.00	0.00	
7% (\$900/mo)										
Extra Rounding							400.00	400.00	0.00	
Communications										
10-4190-3340	7,500.00	7,200.00	10,200.00	20,000.00	43,760.00		45,000.00	45,000.00	0.00	
	6,478.92	6,516.96	7,650.68	15,975.74	35,940.60	0.00				
Detail: Charter/Spectrum - Town Hall & Town							18,900.00	18,900.00	0.00	
Park-designated fiber (\$1,546/mo)										
Budgeted \$1,575/mo										
TRM (\$400/mo)							4,800.00	4,800.00	0.00	
Lightwire - Town Park WiFi & IT Services							20,760.00	20,760.00	0.00	
\$1,730/mo = \$20,760										
Extra Rounding							540.00	540.00	0.00	
Contracted Services										
10-4190-3500	26,000.00	23,000.00	35,000.00	433,000.00	35,000.00		35,500.00	35,500.00	0.00	
	21,560.98	20,919.31	38,384.21	402,408.44	33,823.15	0.00				
Detail: Professional Fire Extinguisher							200.00	200.00	0.00	
Gregory Poole - Generator PM1, PM2 & ATS							1,500.00	1,500.00	0.00	
Modern Mechanical - HVAC Fall & Spring							1,000.00	1,000.00	0.00	
Service/Filters										
Neuse Termite \$150/qtr							600.00	600.00	0.00	
Stone Security \$75/mo							900.00	900.00	0.00	
Cleaning Town Hall \$390/mo							4,680.00	4,680.00	0.00	
Cleaning Fall/Spring windows, Powerwashing Bldg.							1,000.00	1,000.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4190-0000 Public Buildings:										
UniFirst \$65/bi-weekly							1,690.00	1,690.00	0.00	
Lawn Maintenance \$1,200/mo (Town Hall/ALVM)							14,400.00	14,400.00	0.00	
Inclment Weather/Fireants							1,000.00	1,000.00	0.00	
Landscape/Lawn (Incidentals, \$250/Qtr)							1,000.00	1,000.00	0.00	
Others for Town Park, Town Hall, etc.							7,000.00	7,000.00	0.00	
Extra Rounding							530.00	530.00	0.00	
Repairs & Maintenance Buildings										
10-4190-3520	5,000.00	5,000.00	8,000.00	6,000.00	8,000.00		8,000.00	8,000.00	_____	0.00
	1,864.91	346.89	7,764.53	6,911.71	6,950.61	0.00				
Storm Water Repairs										
10-4190-3530	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00		1,000.00	1,000.00	_____	0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Insurance Property & Liability										
10-4190-4500	1,100.00	1,400.00	1,700.00	2,000.00	7,000.00		12,000.00	12,000.00	_____	0.00
	1,047.71	1,371.34	1,682.66	2,080.94	6,482.33	0.00				
Detail: NCLM Prop & Liability Proposal Summary							12,000.00	12,000.00	0.00	
Property = \$11,000										
Inland Marine = \$1,000										
Total Budgeted = \$12,000										
Small Equipment & Furnishings										
10-4190-5000	0.00	0.00	1,750.00	1,000.00	1,000.00		5,000.00	5,000.00	_____	0.00
	0.00	0.00	1,540.34	5,231.83	13,422.30	0.00				
Capital Outlay										
10-4190-5100	0.00	0.00	25,000.00	0.00	0.00		_____	_____	_____	0.00
	0.00	0.00	24,825.00	0.00	0.00	0.00	_____	_____	_____	
Detail: Town Hall Parking Lot - Resurface/Paint, etc							0.00	0.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted		
Department: 10-4190-0000 Public Buildings:											
Veterans Memorial											
10-4190-5200	2,000.00	1,500.00	2,430.00	5,000.00	4,000.00		4,000.00	4,000.00			0.00
	979.89	1,382.60	1,923.57	5,034.55	1,889.07	0.00					
Detail: Flags - Twice/Year							2,000.00	2,000.00		0.00	
Repairs & Maintenance							2,000.00	2,000.00		0.00	
Building Permits											
10-4190-5900	0.00	0.00	0.00	21,300.00	5,000.00		5,000.00	5,000.00			0.00
	0.00	0.00	0.00	21,061.50	370.00	0.00					
Control Total	59,100.00	50,700.00	104,580.00	550,589.00	161,960.00		174,900.00	174,900.00		0.00	0.00
	43,220.32	39,178.36	97,887.47	511,976.65	129,524.18	0.00					

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY

Department: 10-4200-0000 Video Programming:

Video Programming:
10-4200-0000

PEG Media Partners - EWT										
10-4200-3500	53,000.00	52,250.00	51,500.00	51,500.00	60,000.00		82,200.00	82,200.00		0.00
	52,901.22	51,616.12	51,282.08	51,612.88	39,701.25	0.00				
Detail: Per Revenue Acct# 10-3461-0000							82,200.00	82,200.00		0.00
\$6,850/Channel * 3 channels = \$20,550/qt										

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2027 *****	***** 2028 *****	***** 2029 *****	***** 2030 *****	
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Department: 10-4300-0000	Public Safety:										
Public Safety:											
10-4300-0000											
Supplies-Animal Control											
10-4300-2000	500.00	500.00	700.00	500.00	500.00		500.00	500.00		0.00	
	0.00	418.30	76.89	0.00	0.00	0.00					
Training & Meetings-Animal Control											
10-4300-3110	500.00	500.00	500.00	500.00	500.00		500.00	500.00		0.00	
	0.00	0.00	0.00	0.00	0.00	0.00					
Contracted Services-Fire Department											
10-4300-3500	345,000.00	370,000.00	372,500.00	505,000.00	596,000.00		950,300.00	950,300.00		0.00	
	347,623.03	357,222.27	371,331.84	514,094.35	571,445.35	0.00					
Detail:	JoCo Tax Scroll 5/2/25, Utilities & NCDOR TR-2 Form							950,250.00	950,250.00	0.00	
	Net Assessed ADVL \$622,837,408 + Net Assessed Utilities \$5,896,439 + New Assessed MV \$67,417,216 + P & I \$3,000 = Total Assessed \$696,154,063 w/tax rate \$0.32 = \$2,227,693 (\$2,228,000) LESS: Joco Tax Collection Fees (2.5%) See code: 10-4140-4950 = \$55,700 (\$56,000) COMPUTATION: \$2,228,000 - \$56,000 * .4375 (\$0.14/\$0.32) = \$950,250										

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4300-0000	Public Safety:									
Rounding							50.00	50.00	0.00	
Contracted Services-Police Protection										
10-4300-3525	2,000.00	2,000.00	200,000.00	200,000.00	250,000.00		345,000.00	345,000.00		0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Detail: Reimbursing Jo Co Sheriff's Dept							345,000.00	345,000.00	0.00	
2 - Deputy Sheriff (12 hr day/7 day wk + benefits/\$96,000 each = \$192,000)										
2 - Uniforms, Vest, Badges & Equipment, New Hire Costs (\$15,000/each = \$30,000)										
2 - Patrol Vehicles, Equipment, Tires, Maintenance \$56,000/each = \$112,000										
2 - Vehicle Fuel \$5,000/ea = \$10,000										
FIRST YEAR - MORE EXPENSIVE										
RECURRING EXPENSES - SALARIES, BENEFITS, UNIFORMS, PHONE, TRAINING SUPPLIES, VEHICLE INSURANCE, & FUEL										
See Transfer from Public Safety Reserve Fund 32, Revenue Acct Code: 10-3900-3932										
Contracted Services-Animal Control										
10-4300-3550	2,500.00	2,500.00	5,000.00	6,000.00	5,250.00		12,000.00	12,000.00		0.00
	2,476.90	2,188.86	4,448.75	4,410.89	3,969.85	0.00				
Detail: \$1,000/month							12,000.00	12,000.00	0.00	
Control Total	350,500.00	375,500.00	578,700.00	712,000.00	852,250.00		1,308,300.00	1,308,300.00	0.00	0.00
	350,099.93	359,829.43	375,857.48	518,505.24	575,415.20	0.00				

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4510-0000 Public Works:										
Public Works:										
10-4510-0000										
Supplies-Public Works										
10-4510-2000	250.00	1,000.00	1,000.00	1,000.00	1,000.00		1,000.00	1,000.00		0.00
	258.34	0.00	105.95	0.00	0.00	0.00				
Street Lights										
10-4510-3330	8,000.00	8,600.00	10,500.00	11,000.00	9,000.00		11,600.00	11,600.00		0.00
	5,335.15	5,544.83	5,773.70	7,200.54	5,628.57	0.00				
Detail: \$960/mo Rounding							11,520.00	11,520.00	0.00	0.00
							80.00	80.00	0.00	
Repairs & Maintenance - Streets										
10-4510-3520	2,000.00	2,000.00	500.00	2,500.00	1,000.00		1,000.00	1,000.00		0.00
	145.95	0.00	334.90	370.00	0.00	0.00				
Signage										
10-4510-3590	10,000.00	15,000.00	16,500.00	12,500.00	10,000.00		12,000.00	12,000.00		0.00
	6,352.78	11,655.80	16,409.90	12,227.85	10,593.29	0.00				
Detail: Mosca Banners/Road Signs/Welcome Sign							12,000.00	12,000.00	0.00	
Installation Street Lights										
10-4510-5000	3,000.00	4,000.00	0.00	0.00	2,000.00		3,000.00	3,000.00		0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Detail: DukeEnergy-Install 10 add'l wood poles for LED street lighting \$300/ea							3,000.00	3,000.00	0.00	
Control Total	23,250.00	30,600.00	28,500.00	27,000.00	23,000.00		28,600.00	28,600.00	0.00	0.00
	12,092.22	17,200.63	22,624.45	19,798.39	16,221.86	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4910-0000	Planning/Zoning:									
Planning/Zoning:										
10-4910-0000										
Payroll Expenses										
10-4910-1000	0.00	0.00	0.00	0.00	0.00					0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Salaries										
10-4910-1210	18,500.00	35,500.00	58,000.00	90,475.00	128,000.00		125,500.00	125,500.00		0.00
	17,862.25	25,201.14	55,799.23	79,869.28	102,236.62	0.00				
Detail: 2% Adjustment & 2% Merit + Longevity							125,350.00	125,350.00	0.00	
100%:										
\$64,000 - TP										
30%:										
\$15,000 - DC										
15%:										
\$17,550 - TA										
\$15,900 - ATA/FO										
\$12,900 - HRO/TC										
Rounding							150.00	150.00	0.00	
Salaries (Part-Time)										
10-4910-1220	48,500.00	43,850.00	26,000.00	0.00	0.00		7,350.00	7,350.00		0.00
	44,914.75	44,945.90	24,687.77	0.00	2,612.54	0.00				
Detail: Executive Assistant (EA) 35%							7,350.00	7,350.00	0.00	
Salaries Planning Board										
10-4910-1230	1,800.00	1,800.00	1,800.00	2,250.00	2,250.00		2,250.00	2,250.00		0.00
	1,320.00	840.00	1,280.00	700.00	0.00	0.00				
Detail: Annual Organizational Mtg							250.00	250.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	*****	***** 2026 *****	*****	%PY	
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	
Department: 10-4910-0000 Planning/Zoning:										
PB 5 members @ \$50/each										
Planning Board (5 members @ \$50 for 8 meetings)										
							2,000.00	2,000.00	0.00	
Salaries Board of Adjustment										
10-4910-1250	1,400.00	1,400.00	1,400.00	1,750.00	1,750.00		1,750.00	1,750.00	0.00	
	200.00	480.00	360.00	200.00	0.00	0.00				
Detail:	5 Members @ \$50/ each per quarter						1,000.00	1,000.00	0.00	
	2 Alternates @ \$50/each per quarter						400.00	400.00	0.00	
	Annual Organizational Mtg						350.00	350.00	0.00	
	BOA 5 members + 2 alternates @ \$50/each									
	Total \$350									
FICA Taxes										
10-4910-1810	6,000.00	6,600.00	9,500.00	9,200.00	10,600.00		11,000.00	11,000.00	0.00	
	4,945.14	5,953.34	6,321.80	6,226.02	8,065.57	0.00				
Detail:	7.65% of P/Z Salaries - \$136,850 (Figured 8%)						10,948.00	10,948.00	0.00	
	Extra Rounding						52.00	52.00	0.00	
Retirement										
10-4910-1820	3,100.00	5,000.00	9,700.00	15,400.00	18,200.00		18,400.00	18,400.00	0.00	
	2,729.60	4,111.83	8,123.75	10,870.21	14,078.16	0.00				
Detail:	New 14.48% of Full-Time Salaries - \$125,500 (Figured 14.6%)						18,323.00	18,323.00	0.00	
	Rounding						77.00	77.00	0.00	
Medical/Dental/Vision										
10-4910-1830	5,000.00	9,600.00	14,850.00	14,500.00	18,000.00		18,100.00	18,100.00	0.00	
	4,824.60	7,745.40	10,785.68	9,143.60	13,748.59	0.00				
Detail:	State Health Plan (Aetna) - \$800/mo						18,009.00	18,009.00	0.00	
	Vision - \$15.50/mo									
	Dental - \$42/mo									
	Total - \$857.50 * 12 Months = \$10,290									

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4910-0000	Planning/zoning:									
100%:										
\$10,290 - TP										
30%:										
\$3,087 - DC										
15%:										
\$1,544 @ 3 - TA, ATA/FO, HRO/TC										
Rounding							91.00	91.00	0.00	
NC 401-K										
10-4910-1840	1,200.00	2,225.00	5,550.00	9,000.00	10,500.00		7,800.00	7,800.00		0.00
	1,071.74	1,512.00	4,463.98	6,389.34	8,178.80	0.00				
Detail: 6% of Full-Time Salaries - \$125,500							7,718.00	7,718.00	0.00	
(Figured 6.15%)										
Rounding							82.00	82.00	0.00	
Unemployment										
10-4910-1850	350.00	60.00	100.00	100.00	200.00		200.00	200.00		0.00
	190.15	0.00	0.00	151.47	0.00	0.00				
Employee Assistance Program (EAP)										
10-4910-1860	0.00	0.00	0.00	25.00	25.00		25.00	25.00		0.00
	0.00	0.00	0.00	12.99	19.84	0.00				
Detail: \$14/employee/year							24.50	24.50	0.00	
100%:										
\$14 - TP										
30%:										
\$4.20 - DC										
15%:										
\$2.10 @ 3 TA, ATA/FO, HRO/TC										
Rounding							0.50	0.50	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4910-0000 Planning/Zoning:										
Short Term Disability										
10-4910-1880	67.00	120.00	180.00	300.00	400.00		350.00	350.00		0.00
Detail:	57.60	78.00	135.78	187.60	248.50	0.00				
\$16 * 12 mos = \$192							337.00	337.00	0.00	
100%:										
\$192 - TP										
30%:										
\$58 - DC										
15%:										
\$29 @ 3 - TA, ATA/FO, HRO/TC										
Rounding							13.00	13.00	0.00	
Life Insurance										
10-4910-1890	100.00	225.00	425.00	700.00	800.00		800.00	800.00		0.00
Detail:	58.45	119.04	269.19	405.48	569.07	0.00				
Life Insurance is computed							742.00	742.00	0.00	
(1.5 x Salary)/1,000 x \$0.32 = monthly premium @ 12 mos										
100%:										
\$32 - TP										
30%:										
\$25 - DC										
15%:										
\$56 - TA										
\$51 - ATA/FO										
\$42 - HRO/TC										
Rounding							58.00	58.00	0.00	
Supplies										
10-4910-2000	3,000.00	3,000.00	3,000.00	2,500.00	2,000.00		2,000.00	2,000.00		0.00

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4910-0000	Planning/Zoning:									
	817.63	1,081.79	2,252.80	2,264.07	1,285.45	0.00				
Gasoline										
10-4910-3000	250.00 15.73	250.00 102.83	250.00 23.50	300.00 26.47	300.00 148.75	0.00	300.00	300.00		0.00
Vehicle Maintenance										
10-4910-3050	200.00 83.24	200.00 20.00	200.00 72.90	300.00 0.00	300.00 0.00	0.00	300.00	300.00		0.00
Travel										
10-4910-3100	200.00 0.00	500.00 0.00	750.00 310.45	500.00 183.55	500.00 81.68	0.00	500.00	500.00		0.00
Training & Meeting										
10-4910-3110	2,000.00 1,029.00	2,000.00 576.52	3,000.00 2,469.05	3,000.00 1,472.05	6,000.00 4,061.55	0.00	6,000.00	6,000.00		0.00
Detail: TP @ 100%; EA @ 35% DC @ 30% TA,ATA/FO,HRO/TC @ 15%;							6,000.00	6,000.00	0.00	
Postage										
10-4910-3250	450.00 0.00	250.00 72.50	250.00 30.70	250.00 108.60	300.00 0.00	0.00	300.00	300.00		0.00
Contracted Services										
10-4910-3500	50,500.00 51,736.79	53,500.00 10,236.76	55,000.00 42,575.44	93,500.00 89,602.72	28,000.00 5,042.57	0.00	40,000.00	40,000.00		0.00
Detail: Codewriter Planner (ETJ & Retainage) - Chad Meadows Lightwire:							36,700.00	36,700.00	0.00	
							2,900.00	2,900.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY

Department: 10-4910-0000 Planning/Zoning:

RMM-Remote Monitor/Malware
TP, TP Laptop
(2 @ \$26/mo/ea * 12 months) = \$624
EA
(\$26/mo * 12 months = \$312 @ 35%) = \$109
DC
(\$26/mo * 12 months = \$312 @ 30%) = \$94
TA, ATA/FO, ATA/FO Laptop, HRO/TC
(4 @ \$26/mo/ea * 12 months = \$1,248 @ 15%) = \$187

Office 365 Backup
\$26 * 12 mos = \$312

LightMail+
TP
(\$26/mo * 12 months) = \$312
EA
(\$26/mo * 12 months = \$312 @ 35%) = \$109
DC
(\$26/mo * 12 months = \$312 @ 30%) = \$94
TA, ATA/FO, HRO/TC
(3 @ \$26/mo/ea * 12 months = \$936 @ 15%) = \$141

LightMail
5 Planning Board Email Accounts
(5 @ \$15/mo/ea * 12 months) = \$900
VC3 Archiving Emails (6 @ \$55/each)
Rounding

330.00	330.00	0.00
70.00	70.00	0.00

Contracted Services-Software										
10-4910-3600	4,500.00	2,725.00	2,750.00	3,600.00	3,500.00		3,500.00	3,500.00		0.00
	4,285.00	2,684.75	2,674.84	2,813.59	3,179.42	0.00				
Detail: Edmunds GovTech (\$5,250 Total, Cloud							1,312.00	1,312.00		0.00

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-4910-0000 Planning/Zoning:										
Hosting-Level1) 25%										
Edmunds GovTech (Annual Maintenance-CPCE Module = \$1,525)							1,525.00	1,525.00	0.00	
Adobe Pro License TP = \$300							630.00	630.00	0.00	
EA (\$300/yr @ 35%) = \$105										
DC (\$300 @ 30%) = \$90										
TA, ATA/FO, HRO/TC (3 @ \$300/yr = \$900 @ 15%) = \$135										
Rounding							33.00	33.00	0.00	
Code Enforcement Services										
10-4910-3650	1,500.00 0.00	2,000.00 0.00	2,000.00 0.00	2,000.00 0.00	1,000.00 0.00		1,000.00	1,000.00		0.00
Dues & Subscriptions										
10-4910-4000	1,200.00 957.46	1,200.00 1,370.74	1,500.00 617.41	1,100.00 907.68	1,500.00 235.00		1,505.00	1,505.00		0.00
Detail: NC Municipal Clerk's Assoc (NCAMC) - DC							100.00	100.00	0.00	
Amazon Business Prime \$180/yr / 4 departments = \$45							45.00	45.00	0.00	
Floodplain - TP							200.00	200.00	0.00	
Code Enforcement Certification - TP							100.00	100.00	0.00	
APA - TP							600.00	600.00	0.00	
NC Assoc Zoning Officials - TP							50.00	50.00	0.00	
NC Zoning Membership - TP							70.00	70.00	0.00	
Rounding							340.00	340.00	0.00	
Insurance Workers Compensation										
10-4910-4550	150.00 150.00	190.00 143.00	125.00 125.00	250.00 173.29	250.00 192.92		200.00	200.00		0.00
Detail: See WComp Salary Worksheet - Kim							200.00	200.00	0.00	
Registering Documents										

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** 2026 ***** Requested	***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-4910-0000	Planning/Zoning:									
10-4910-4900	100.00	100.00	100.00	100.00	100.00		100.00	100.00	_____	0.00
Detail: @ Jo Co Courthouse	0.00	52.00	0.00	26.00	0.00	0.00	100.00	100.00	0.00	
Small Equipment & Furnishings										
10-4910-5000	2,000.00	2,000.00	2,500.00	2,000.00	2,000.00		2,000.00	2,000.00	_____	0.00
	798.98	1,512.19	2,020.09	598.46	1,127.93	0.00				
Control Total	152,067.00	174,295.00	198,930.00	253,100.00	236,475.00		251,230.00	251,230.00	0.00	0.00
	138,048.11	108,839.73	165,399.36	212,332.47	165,112.96	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-6120-0000	Parks & Recreation:									
Parks & Recreation:										
10-6120-0000										
Payroll Expenses										
10-6120-1000	0.00	0.00	0.00	0.00	0.00					0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Salaries										
10-6120-1210	0.00	0.00	64,000.00	166,000.00	228,500.00		229,500.00	229,500.00		0.00
	0.00	0.00	61,797.28	162,192.96	184,749.96	0.00				
Detail: 2% Adjustment & 2% Merit + Longevity							229,350.00	229,350.00	0.00	
100%:										
\$87,000 - PRD										
\$50,000 - PMS 1										
\$46,000 - PMS 2										
15%:										
\$17,550 - TA										
\$15,900 - ATA/FO										
\$12,900 - HRO/TC										
Rounding							150.00	150.00	0.00	
Overtime										
10-6120-1215	0.00	0.00	0.00	1,000.00	5,000.00		5,000.00	5,000.00		0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Detail: Full-Time non-exempt							5,000.00	5,000.00	0.00	
Salaries (Part-Time)										
10-6120-1220	0.00	1,000.00	15,000.00	24,000.00	35,000.00		33,150.00	33,150.00		0.00
	0.00	0.00	12,942.39	22,265.43	20,594.77	0.00				
Detail: Executive Assistant (EA) 15% = \$3,150 + Other Part-Time Employees \$30,000							33,150.00	33,150.00	0.00	

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-6120-0000 Parks & Recreation:										
FICA Taxes										
10-6120-1810	0.00	400.00	8,400.00	15,500.00	22,000.00		21,900.00	21,900.00		0.00
	0.00	0.00	5,725.62	14,138.59	15,748.36	0.00				
Detail: 7.65% of P&R Salaries - \$272,650 (Figured 8%) Rounding							21,812.00	21,812.00	0.00	
							88.00	88.00	0.00	
Retirement										
10-6120-1820	0.00	700.00	13,650.00	24,110.00	32,500.00		33,600.00	33,600.00		0.00
	0.00	0.00	9,604.12	23,996.93	25,433.16	0.00				
Detail: New 14.48% of Full-Time Salaries - \$229,500 (Figured 14.6%) Rounding							33,507.00	33,507.00	0.00	
							93.00	93.00	0.00	
Medical/Dental/Vision										
10-6120-1830	0.00	0.00	15,400.00	24,000.00	35,500.00		35,600.00	35,600.00		0.00
	0.00	0.00	6,197.94	20,769.60	20,874.77	0.00				
Detail: State Health Plan (Aetna) - \$800/mo Vision - \$15.50/mo Dental - \$42/mo Total - \$857.50 * 12 Months = \$10,290 100%: \$10,290 @ 3 - PRD, PMS 1 & PMS 2 15%: \$1,544 @ 3 - TA, ATA/FO, HRO/TC Rounding							35,502.00	35,502.00	0.00	
							98.00	98.00	0.00	
NC 401-K										
10-6120-1840	0.00	0.00	8,600.00	13,800.00	18,650.00		14,200.00	14,200.00		0.00
	0.00	0.00	4,943.79	12,975.19	14,775.96	0.00				
Detail: 6% of Full-Time Salaries - \$229,500 (Figured 6.15%) Rounding							14,114.00	14,114.00	0.00	
							86.00	86.00	0.00	

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-6120-0000 Parks & Recreation:										
Unemployment										
10-6120-1850	0.00	0.00	250.00	300.00	300.00		300.00	300.00		0.00
	0.00	0.00	0.00	300.00	0.00	0.00				
Employee Assistance Program (EAP)										
10-6120-1860	0.00	0.00	0.00	40.00	50.00		50.00	50.00		0.00
	0.00	0.00	0.00	33.51	47.19	0.00				
Detail: \$14/employee/year							49.00	49.00	0.00	
100%: \$14 @ 3 - PRD, RMS 1 & RMS 2										
15%: \$2.10 @ 3 TA, ATA/FO, HRO/TC Rounding							1.00	1.00	0.00	
Short Term Disability										
10-6120-1880	0.00	0.00	325.00	500.00	630.00		700.00	700.00		0.00
	0.00	0.00	122.07	397.60	517.30	0.00				
Detail: \$16 * 12 mos = \$192							663.00	663.00	0.00	
100%: \$192 @ 3 - PRD, PMS 1, PMS 2										
15%: \$29 @ 3 - TA, ATA/FO, HRO/TC Rounding							37.00	37.00	0.00	
Life Insurance										
10-6120-1890	0.00	0.00	650.00	1,100.00	1,420.00		1,400.00	1,400.00		0.00
	0.00	0.00	341.52	918.43	1,095.28	0.00				
Detail: Life Insurance is computed (1.5 x Salary)/1,000 x \$0.32 = monthly premium @ 12 mos							1,348.00	1,348.00	0.00	

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-6120-0000 Parks & Recreation:										
100%:										
\$42/mo - PRD										
\$25/mo - PMS 1										
\$23/mo - PMS 2										
15%:										
\$56/mo - TA										
\$51/mo - ATA/FO										
\$42/mo - HRO/TC										
Rounding										
							52.00	52.00	0.00	
Supplies-Parks & Rec										
10-6120-2000	15,000.00	10,000.00	1,500.00	6,000.00	5,000.00		3,500.00	3,500.00		0.00
	15,500.00	9,900.00	2,637.95	6,556.53	2,685.61	0.00				
Detail: Office supplies only!							3,500.00	3,500.00	0.00	
Program Materials & Supplies-Parks & Rec										
10-6120-2050	0.00	0.00	8,000.00	78,000.00	70,000.00		70,000.00	70,000.00		0.00
	0.00	0.00	3,032.38	76,686.34	51,461.98	0.00				
Uniforms										
10-6120-2080	0.00	0.00	1,000.00	1,000.00	1,000.00		1,500.00	1,500.00		0.00
	0.00	0.00	911.50	953.00	762.90	0.00				
Gasoline										
10-6120-3000	0.00	0.00	750.00	5,000.00	5,000.00		5,000.00	5,000.00		0.00
	0.00	0.00	750.92	3,766.09	3,818.12	0.00				
Detail: Ford F-250 Truck, Weed Eaters, Mowers, Blowers, etc.							5,000.00	5,000.00	0.00	
Vehicle Maintenance										
10-6120-3050	0.00	0.00	200.00	1,000.00	1,000.00		1,000.00	1,000.00		0.00
	0.00	0.00	16.50	89.44	102.84	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-6120-0000	Parks & Recreation:									
Detail: Ford F-250 & F-150							1,000.00	1,000.00	0.00	
Travel										
10-6120-3100	0.00	0.00	350.00	1,000.00	1,500.00		1,500.00	1,500.00		0.00
	0.00	0.00	310.43	1,088.10	1,042.49	0.00				
Training & Meetings										
10-6120-3110	0.00	0.00	1,500.00	7,000.00	8,000.00		9,000.00	9,000.00		0.00
	0.00	0.00	1,177.87	6,036.69	7,543.02	0.00				
Detail: PRD, PMS 1, PMS 2 @ 100%							9,000.00	9,000.00	0.00	
TA, ATA/FO, HRO/TC @ 15%										
Postage										
10-6120-3250	0.00	0.00	100.00	100.00	150.00		100.00	100.00		0.00
	0.00	0.00	0.00	0.00	422.50	0.00				
Contracted Services										
10-6120-3500	40,000.00	30,000.00	567,000.00	80,565.00	55,240.00		52,000.00	52,000.00		0.00
	40,000.00	30,000.00	565,081.63	78,932.40	61,030.15	0.00				
Detail: ALCC: July 2026 Fireworks (Diamond Sponsorship)							1,500.00	1,500.00	0.00	
ALCC: Senior Activity Mornings (SAM) Rec'd Request Letter for \$400/mo = \$4,800; budgeted \$200/mo							4,800.00	4,800.00	0.00	
ALCC: Mower Lease Reimbursement \$788.20/mo @ 2 mos (ALCC's Lease ends August 2025)							1,576.00	1,576.00	0.00	
Booking Agents, Program Instructors, Umpires, Referees, Etc.							40,000.00	40,000.00	0.00	
Lightwire:							1,718.00	1,718.00	0.00	
RMM-Remote Monitor/Malware PRD = \$312										
TA, ATA/FO, ATA/FO Laptop, HRO/TC, EA (5 @ \$26/mo/ea * 12 months = \$1,560 @										

Description	2021	2022	2023	2024	***** 2025	*****	***** 2026	*****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted
Department: 10-6120-0000 Parks & Recreation:									
15%) = \$234									
Office 365 Backup \$26 * 12 mos = \$312									
LightMail+ PRD = \$312 TA, ATA/FO, HRO/TC, EA (4 @ \$26/mo/ea * 12 months = \$1,248 @ 15%) = \$188									
LightMail PMS 1, PMS 2 (2 @ \$15/mo/ea * 12 months) = \$360									
Rounding							2,406.00	2,406.00	0.00
Repairs & Maintenance Equipment									
10-6120-3520	0.00	0.00	0.00	1,500.00	2,500.00		5,000.00	5,000.00	0.00
	0.00	0.00	0.00	2,472.92	5,338.77	0.00			
Contracted Services-Software									
10-6120-3600	0.00	0.00	4,250.00	8,300.00	1,750.00		1,600.00	1,600.00	0.00
	0.00	0.00	2,000.00	8,000.00	1,344.54	0.00			
Detail: Edmunds GovTech (\$5,250 Total, cCloud Hosting-Level1) 25%							1,312.00	1,312.00	0.00
Adobe Pro License EA (\$300/yr @ 15%) = \$45 TA, ATA/FO, HRO/TC (3 @ \$300/yr = \$900 @ 15%) = \$135							180.00	180.00	0.00
Rounding							108.00	108.00	0.00
Dues & Subscriptions									
10-6120-4000	0.00	0.00	200.00	1,000.00	1,400.00		1,400.00	1,400.00	0.00
	0.00	0.00	118.44	1,124.33	390.00	0.00			
Detail: NRPA (National Recreation and Park							470.00	470.00	0.00

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Department: 10-6120-0000	Parks & Recreation:										
Assoc)											
NCRPA (NC Recreation and Park Assoc)							205.00	205.00	0.00		
Jo Co Public Schools (partnership to access facilities)							500.00	500.00	0.00		
Amazon Business Prime \$180/yr / 4 departments = \$45							45.00	45.00	0.00		
Rounding							180.00	180.00	0.00		
Equipment Lease											
10-6120-4200	0.00	0.00	0.00	0.00	0.00		19,100.00	19,100.00		0.00	
	0.00	0.00	0.00	0.00	0.00	0.00					
Detail: Reel Mower \$95,000 Lease over 5 years							19,020.00	19,020.00	0.00		
Estimated \$1,585/monthly payment											
Rounding							80.00	80.00	0.00		
Insurance Property & Liability											
10-6120-4500	0.00	0.00	500.00	10,000.00	4,900.00		5,500.00	5,500.00		0.00	
	0.00	0.00	200.33	3,881.19	4,858.97	0.00					
Detail: NCLM Prop & Liability Proposal Summary							1,500.00	1,500.00	0.00		
Ford F-250, F-150, Enclosed Trailer & Kraftsman Flatbed Trailer = \$1,500											
JCLL Insurance							4,000.00	4,000.00	0.00		
Insurance Workers Compensation											
10-6120-4550	0.00	0.00	1,865.00	6,435.00	5,000.00		4,000.00	4,000.00		0.00	
	0.00	0.00	1,864.05	6,036.59	4,648.92	0.00					
Detail: See WComp Salary Worksheet - Kim							4,000.00	4,000.00	0.00		
Small Equipment & Furnishings											
10-6120-5000	0.00	0.00	46,000.00	42,000.00	6,000.00		6,000.00	6,000.00		0.00	
	0.00	438.22	36,559.08	30,558.25	3,938.22	0.00					
Detail: Desks, Chairs, Computers, File Cabinet, Tools, Park Maintenance Equipment, etc.							6,000.00	6,000.00	0.00		

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****				
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-6120-0000	Parks & Recreation:									
Control Total	55,000.00 55,500.00	42,100.00 40,338.22	759,490.00 716,335.81	519,250.00 484,170.11	547,990.00 433,225.78		561,600.00	561,600.00	0.00	0.00

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-9110-0000 Debt Service & Fees:										
Debt Service & Fees:										
10-9110-0000										
Principal-HR Software Module (SBITA)										
10-9110-0500	0.00	0.00	0.00	0.00	6,750.00		6,900.00	6,900.00		0.00
	0.00	0.00	6,750.00	0.00	6,750.00	0.00				
Detail: HR Module \$4,150 & Employee Self Service Module \$2,750							6,900.00	6,900.00	0.00	
Principal-P&R Software Module (SBITA)										
10-9110-0600	0.00	0.00	0.00	0.00	4,500.00		4,650.00	4,650.00		0.00
	0.00	0.00	2,250.00	0.00	4,500.00	0.00				
Principal Payments										
10-9110-1000	33,334.00	33,334.00	33,334.00	33,334.00	33,335.00		33,335.00	33,335.00		0.00
	33,333.33	33,333.33	33,333.33	33,333.33	33,333.33	0.00				
Detail: 3/2027 Pay Off Extra Rounding							33,334.00 1.00	33,334.00 1.00	0.00 0.00	
Principal Payments-Park Land										
10-9110-1100	50,001.00	50,001.00	50,001.00	50,001.00	50,000.00		50,000.00	50,000.00		0.00
	50,000.00	50,000.00	50,000.00	50,000.00	50,000.00	0.00				
Detail: 8/2026 Pay Off							50,000.00	50,000.00	0.00	
Principal Payments-Expansion Town Hall										
10-9110-1200	27,001.00	27,001.00	27,001.00	27,001.00	27,000.00		27,000.00	27,000.00		0.00
	27,000.00	27,000.00	27,000.00	27,000.00	27,000.00	0.00				
Detail: 9/2033 Pay Off							27,000.00	27,000.00	0.00	
Interest Payments										
10-9110-2000	7,957.00	6,820.00	5,684.00	4,550.00	3,415.00		2,275.00	2,275.00		0.00

Description Budget Account Number	2021 Approp Actual	2022 Approp Actual	2023 Approp Actual	2024 Approp Actual	***** 2025 ***** Approp Actual	***** Estimated Full Year Actual	***** Requested	***** 2026 ***** Admin. Recmnd	***** Budgeted	%PY
Department: 10-9110-0000 Debt Service & Fees:										
Detail: 3/2027 Pay Off Rounding	7,956.67	6,820.00	5,683.33	4,546.67	3,410.00	0.00	2,274.00 1.00	2,274.00 1.00	0.00 0.00	
Interest Payments-Park Land										
10-9110-2100	14,001.00	12,000.00	10,000.00	8,000.00	6,000.00		4,000.00	4,000.00	_____	0.00
Detail: 8/2026 Pay Off	14,000.00	12,000.00	10,000.00	8,000.00	6,000.00	0.00	4,000.00	4,000.00	0.00	
Interest Payments-Expansion Town Hall										
10-9110-2200	12,775.00	11,829.00	10,920.00	10,010.00	9,125.00		8,190.00	8,190.00	_____	0.00
Detail: 9/2033 Pay Off Rounding	12,771.00	11,828.71	10,916.30	10,003.92	9,116.45	0.00	8,189.00 1.00	8,189.00 1.00	0.00 0.00	
Control Total	145,069.00 145,061.00	140,985.00 140,982.04	136,940.00 145,932.96	132,896.00 132,883.92	140,125.00 140,109.78	0.00	136,350.00	136,350.00	0.00	0.00

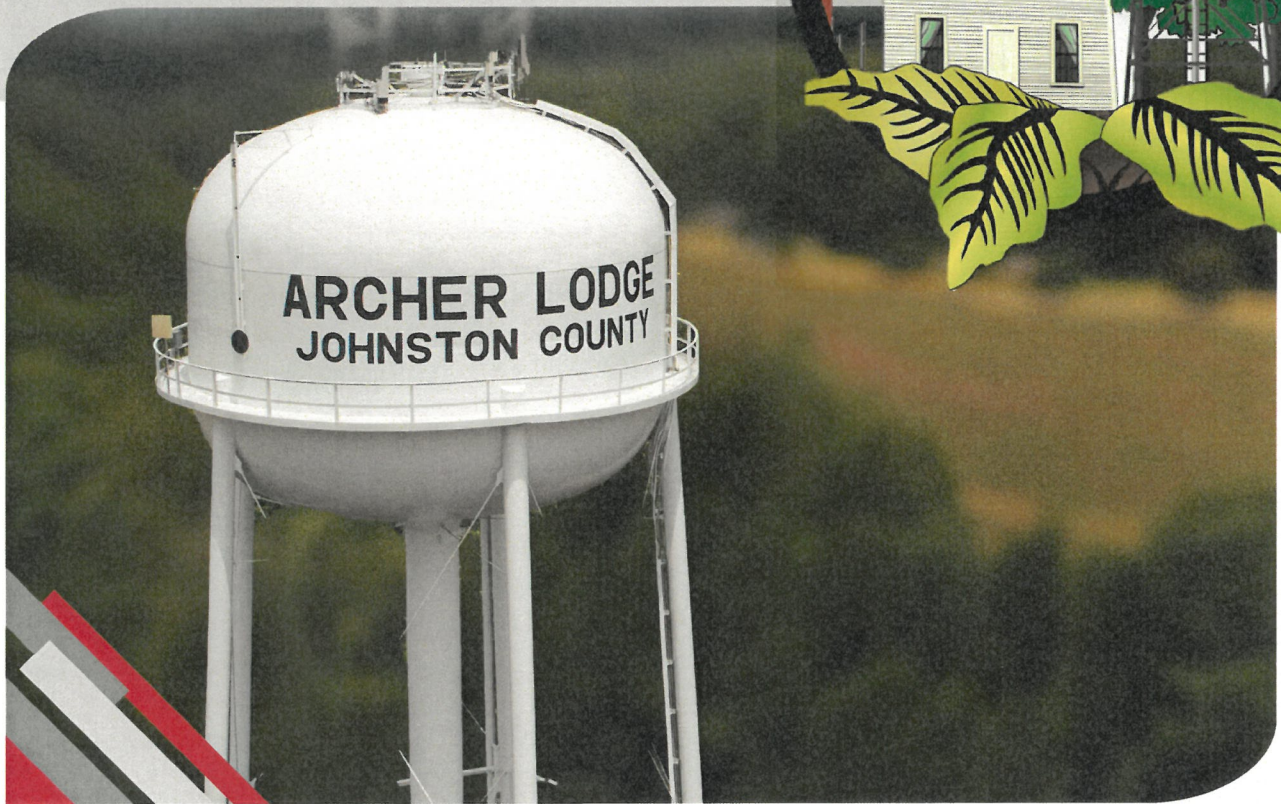
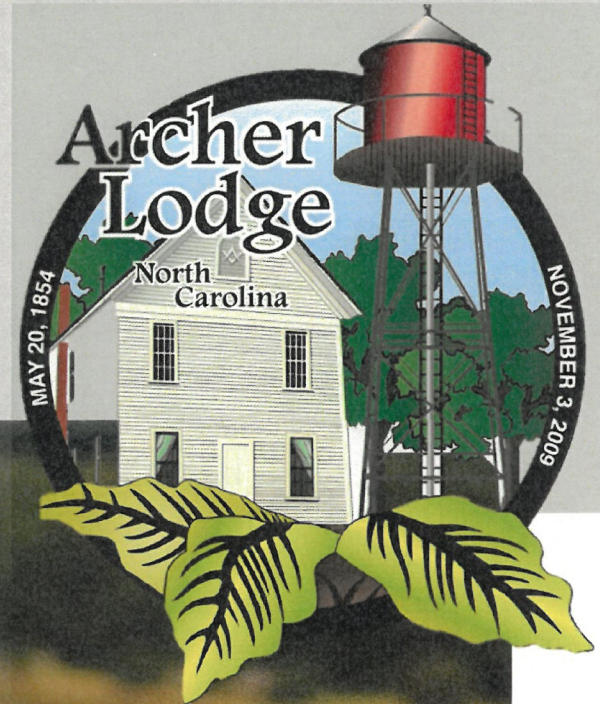
Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-9900-0000 Interfund Transfers:										
Interfund Transfers:										
10-9900-0000										
Transfer to Capital Reserve Fund 30										
10-9900-0030	50,000.00	25,000.00	0.00	0.00	0.00		50,000.00	50,000.00		0.00
	50,000.00	25,000.00	0.00	0.00	0.00	0.00				
Transfer to Park Reserve Fund 31										
10-9900-0031	156,000.00	123,000.00	160,000.00	162,000.00	139,000.00		190,000.00	190,000.00		0.00
	155,444.52	119,163.27	85,205.64	86,623.42	81,660.15	0.00				
Detail:	Fee In Lieu Revenues (Acct# 10-3345-0000)									
	36 lots @ \$1,500									
	JoCo Tax Scroll 5/2/25, Utilities & NCDOR TR-2 Form									
	Net Assessed ADVL \$622,837,408 +									
	Net Assessed Utilities \$5,896,439 +									
	New Assessed MV \$67,417,216 +									
	P & I \$3,000 =									
	Total Assessed \$696,154,063									
	w/tax rate \$0.32 = \$2,227,693									
	(\$2,228,000)									
	LESS:									
	Joco Tax Collection Fees (2.5%)									
	See code: 10-4140-4950 = \$55,700									
	(\$56,000)									
	COMPUTATION:									
	\$2,228,000 - \$56,000 * .0625									
	(\$0.02/\$0.32) = \$135,750									
	Rounding									
							250.00	250.00	0.00	

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 10-9900-0000 Interfund Transfers:										
Transfer to Public Safety Reserve Fnd 32										
10-9900-0032	50,000.00	25,000.00	0.00	0.00	0.00		50,000.00	50,000.00		0.00
	50,000.00	25,000.00	0.00	0.00	0.00	0.00				

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Department: 10-9990-0000											
Transfer to Fund Balance											
10-9990-0000	0.00	0.00	0.00	0.00	0.00		116,520.00	116,520.00		0.00	
	0.00	0.00	0.00	0.00	0.00	0.00					
Budgeted Total	1,436,200.50	1,431,705.00	2,447,905.00	2,928,500.00	2,739,550.00		3,532,700.00	3,532,700.00	0.00	0.00	
	1,350,354.27	1,257,033.16	2,056,537.33	2,502,660.66	2,008,041.42	0.00					
Non-Budget Total	0.00	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
	0.00	0.00	0.00	0.00	0.00	0.00					
Budget Fund Total	1,436,200.50	1,431,705.00	2,447,905.00	2,928,500.00	2,739,550.00		3,532,700.00	3,532,700.00	0.00	0.00	
	1,350,354.27	1,257,033.16	2,056,537.33	2,502,660.66	2,008,041.42	0.00					
Year Total	1,436,200.50	1,431,705.00	2,447,905.00	2,928,500.00	2,739,550.00		3,532,700.00	3,532,700.00	0.00	0.00	
	1,350,354.27	1,257,033.16	2,056,537.33	2,502,660.66	2,008,041.42	0.00					

PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



CAPITAL RESERVE FUND 30

Description Revenue Account Number	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	Admin. Recmnd	Anticipated	%PY
	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year			
Investment Earnings									
30-3831-0000	1,800.00	1,800.00	9,500.00	3,000.00	1,000.00		1,000.00		0.00
	1,782.80	2,033.30	9,546.88	2,420.43	841.41	0.00			
Transfer from General Fund									
30-3900-3910	50,000.00	25,000.00	0.00	0.00	25,000.00		50,000.00		0.00
	50,000.00	25,000.00	0.00	0.00	0.00	0.00			
Revenue Fund Total	51,800.00	26,800.00	9,500.00	3,000.00	26,000.00		51,000.00	0.00	0.00
	51,782.80	27,033.30	9,546.88	2,420.43	841.41	0.00			
Year Total	51,800.00	26,800.00	9,500.00	3,000.00	26,000.00		51,000.00	0.00	0.00
	51,782.80	27,033.30	9,546.88	2,420.43	841.41	0.00			

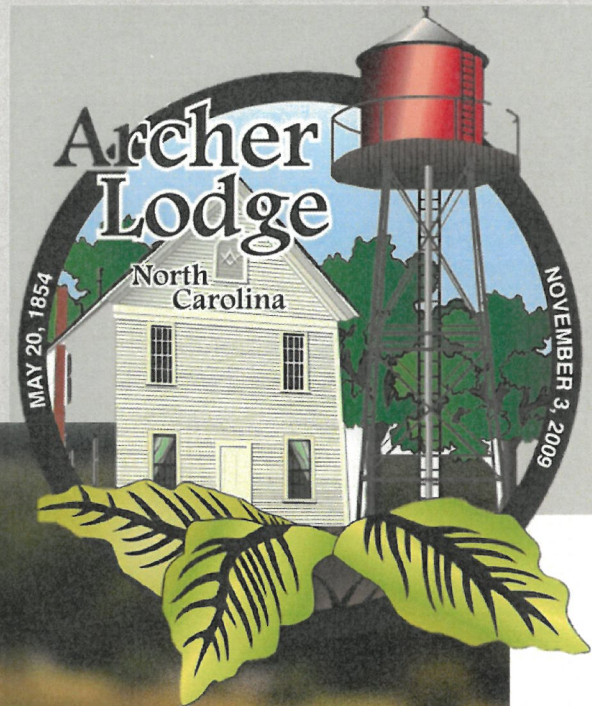
Range of Expend Accounts: 30-0000-0000 to 30-9999-9999
 Range of Revenue Accounts: 30-0000-0000 to 30-9999-9999
 For Budget: %PY = ((Budgeted / (Appropriated + Transfers)) - 1) * 100

For Revenue: %PY = ((2026 Anticipated / 2025 Anticipated) - 1) * 100

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Transfer to Fund Balance											
30-9990-0000	0.00 0.00	0.00 0.00	9,500.00 0.00	3,000.00 0.00	26,000.00 0.00	0.00	51,000.00	51,000.00		0.00	
Budgeted Total	0.00 0.00	0.00 0.00	9,500.00 0.00	3,000.00 0.00	26,000.00 0.00	0.00	51,000.00	51,000.00	0.00	0.00	
Non-Budget Total	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00	0.00	0.00	0.00	0.00	
Budget Fund Total	0.00 0.00	0.00 0.00	9,500.00 0.00	3,000.00 0.00	26,000.00 0.00	0.00	51,000.00	51,000.00	0.00	0.00	
Year Total	0.00 0.00	0.00 0.00	9,500.00 0.00	3,000.00 0.00	26,000.00 0.00	0.00	51,000.00	51,000.00	0.00	0.00	

PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



PARK RESERVE FUND 31

Description	2021	2022	2023	2024	***** 2025	*****	***** 2026	*****		
Revenue Account Number	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year	Admin. Recmnd	Anticipated	%PY	
				Comments						
Investment Earnings										
31-3831-0000	1,100.00	1,200.00	3,500.00	1,000.00	1,000.00		2,000.00		0.00	
	1,121.43	1,235.33	3,229.10	1,863.76	2,251.66	0.00				
Transfer from General Fund										
31-3900-3910	156,000.00	123,000.00	160,000.00	162,000.00	139,000.00		190,000.00		0.00	
	155,444.52	119,163.27	85,205.64	86,623.42	81,660.15	0.00				
Detail:	JoCo Tax Scroll 5/2/25, Utilities & NCDOR TR-2 Form							135,750.00	0.00	
	Net Assessed ADVL \$622,837,408 + Net Assessed Utilities \$5,896,439 + New Assessed MV \$67,417,216 + P & I \$3,000 = Total Assessed \$696,154,063 w/tax rate \$0.32 = \$2,227,693 (\$2,228,000) LESS: Joco Tax Collection Fees (2.5%) See code: 10-4140-4950 = \$55,700 (\$56,000) COMPUTATION: \$2,228,000 - \$56,000 * .0625 (\$0.02/\$0.32) = \$135,750 Fee In Lieu Revenues (Acct# 10-3345-0000) 36 lots @ \$1,500 Rounding									
							54,000.00	0.00		
							250.00	0.00		
Revenue Fund Total	157,100.00	124,200.00	163,500.00	163,000.00	140,000.00		192,000.00	0.00	0.00	
	156,565.95	120,398.60	88,434.74	88,487.18	83,911.81	0.00				
Year Total	157,100.00	124,200.00	163,500.00	163,000.00	140,000.00		192,000.00	0.00	0.00	
	156,565.95	120,398.60	88,434.74	88,487.18	83,911.81	0.00				

Range of Expend Accounts: 31-0000-0000 to 31-9999-9999
 Range of Revenue Accounts: 31-0000-0000 to 31-9999-9999
 For Budget: %PY = ((Budgeted / (Appropriated + Transfers)) - 1) * 100

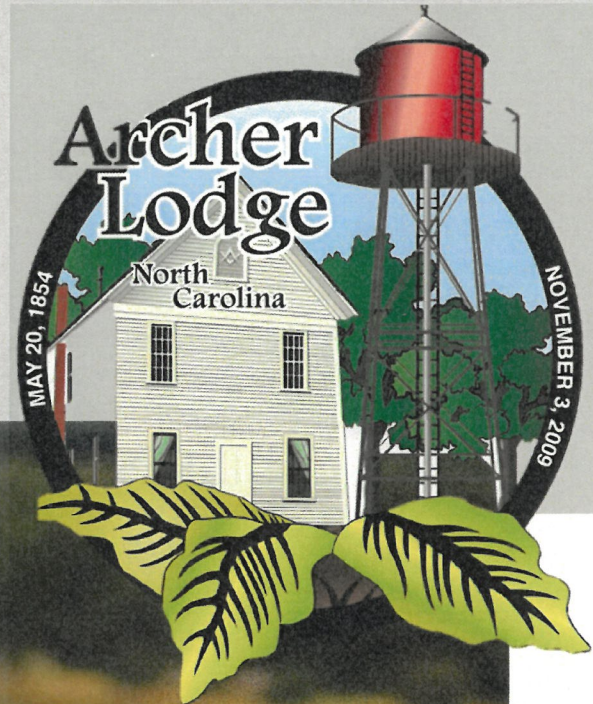
For Revenue: %PY = ((2026 Anticipated / 2025 Anticipated) - 1) * 100

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY	
Transfer to General Fund 10											
31-9900-0010	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00		54,000.00	54,000.00		0.00	
Detail: Park Loan Payment	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00	0.00	54,000.00	54,000.00	0.00		

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 31-9990-0000	Transfer to Fund Balance									
Transfer to Fund Balance										
31-9990-0000	0.00	0.00	103,500.00	55,000.00	0.00		138,000.00	138,000.00		0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Budgeted Total	64,000.00	62,000.00	163,500.00	113,000.00	56,000.00		192,000.00	192,000.00	0.00	0.00
	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00	0.00				
Non-Budget Total	0.00	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00				
Budget Fund Total	64,000.00	62,000.00	163,500.00	113,000.00	56,000.00		192,000.00	192,000.00	0.00	0.00
	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00	0.00				
Year Total	64,000.00	62,000.00	163,500.00	113,000.00	56,000.00		192,000.00	192,000.00	0.00	0.00
	64,000.00	62,000.00	60,000.00	58,000.00	56,000.00	0.00				

PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



PUBLIC SAFETY RESERVE FUND 32

Description Revenue Account Number	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****		%PY	
	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Anticipated Actual	Estimated Full Year	Admin. Recmnd Anticipated		
	Comments								
Investment Earnings									
32-3831-0000	1,250.00	1,300.00	12,500.00	20,000.00	1,000.00		12,000.00		0.00
	1,241.46	1,458.84	13,439.28	20,586.83	13,069.83	0.00			
Transfer from General Fund 10									
32-3900-3910	50,000.00	25,000.00	0.00	0.00	25,000.00		50,000.00		0.00
	50,000.00	25,000.00	0.00	0.00	0.00	0.00			
Fund Balance Appropriated									
32-3990-0000	0.00	0.00	0.00	180,000.00	224,000.00		283,000.00		0.00
	0.00	0.00	0.00	0.00	0.00	0.00			
Revenue Fund Total									
	51,250.00	26,300.00	12,500.00	200,000.00	250,000.00		345,000.00	0.00	0.00
	51,241.46	26,458.84	13,439.28	20,586.83	13,069.83	0.00			
Year Total									
	51,250.00	26,300.00	12,500.00	200,000.00	250,000.00		345,000.00	0.00	0.00
	51,241.46	26,458.84	13,439.28	20,586.83	13,069.83	0.00			

Range of Expend Accounts: 32-0000-0000 to 32-9999-9999
 Range of Revenue Accounts: 32-0000-0000 to 32-9999-9999
 For Budget: %PY = ((Budgeted / (Appropriated + Transfers)) - 1) * 100

For Revenue: %PY = ((2026 Anticipated / 2025 Anticipated) - 1) * 100

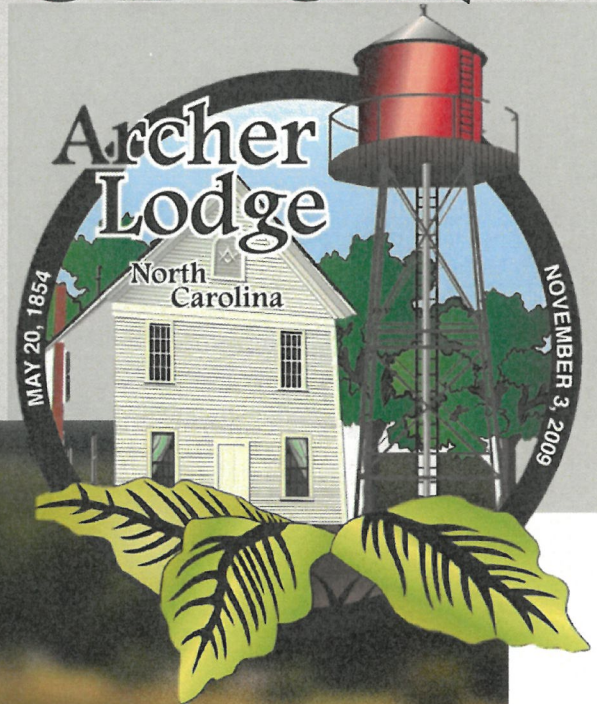
Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	***** 2026 *****	%PY
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted		
Transfer to General Fund 10											
32-9900-0010	0.00	0.00	0.00	200,000.00	250,000.00		345,000.00	345,000.00			0.00
	0.00	0.00	0.00	0.00	0.00	0.00					
Detail: Reimbursing Jo Co Sheriff's Dept							345,000.00	345,000.00		0.00	
2 - Deputy Sheriff (12 hr day/7 day wk + benefits/\$96,000 each = \$192,000)											
2 - Uniforms, Vest, Badges & Equipment, New Hire Costs (\$15,000/each = \$30,000)											
2 - Patrol Vehicles, Equipment, Tires, Maintenance \$56,000/each = \$112,000											
2 - Vehicle Fuel \$5,000/ea = \$10,000											
FIRST YEAR - MORE EXPENSIVE											
RECURRING EXPENSES - SALARIES, BENEFITS, UNIFORMS, PHONE, TRAINING SUPPLIES, VEHICLE INSURANCE, & FUEL											
See Transfer from Public Safety Reserve Fund 32, Revenue Acct Code: 10-3900-3932											
Budgeted Total	0.00	0.00	0.00	200,000.00	250,000.00		345,000.00	345,000.00		0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00					
Non-Budget Total	0.00	0.00	0.00	0.00	0.00		0.00	0.00		0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00					
Budget Fund Total	0.00	0.00	0.00	200,000.00	250,000.00		345,000.00	345,000.00		0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00					

Town of Archer Lodge
Budget/Revenue Preparation Worksheet

Description	2021	2022	2023	2024	***** 2025 *****	***** 2026 *****				
Budget Account Number	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Approp Actual	Estimated Full Year Actual	Requested	Admin. Recmnd	Budgeted	%PY
Department: 32-9900-0000										
Year Total	0.00	0.00	0.00	200,000.00	250,000.00		345,000.00	345,000.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00				

PROPOSED ANNUAL BUDGET FY 25-26

FOR FISCAL YEAR
ENDING JUNE 30, 2026



FEE SCHEDULE

TABLE OF CONTENTS

	PAGE
ANIMAL CONTROL VIOLATION FEES	1
OTHER CODE VIOLATION FEES.....	1
ELECTION FILING FEES.....	1
MISCELLANEOUS FEES.....	1
PARKS & RECREATION FEES	2 - 4
PLANNING & ZONING FEES.....	5 - 6
ADDITIONAL FEES & TOWN TAXES.....	7

CODE OF ORDINANCE – ANIMAL CONTROL VIOLATIONS – CIVIL PENALTIES

DESCRIPTION	FEE
Animal Cruelty (each offense, each domesticated animal)	\$ 500.00
Dangerous (Aggressive) Dog (each offense, each domesticated animal)	\$ 500.00
Other Violations (each offense, each domesticated animal):	
1 st Violation	\$ 100.00
2 nd Violation	\$ 200.00
3 rd Violation and subsequent violations	\$ 300.00

OTHER CODE OF ORDINANCE VIOLATIONS – CIVIL PENALTIES

CODE OF ORDINANCE VIOLATION	FEE
1 st Violation	\$ 100.00
2 nd Violation	\$ 200.00
Subsequent Violations	\$ 300.00
Plus, Investigative Cost above \$500.	Actual Cost
Plus, Clean-up-Fee	Actual Cost

ELECTIONS

DESCRIPTION	FEE
Filing Fee:	
Mayor	\$ 10.00
Councilmember	\$ 5.00

MISCELLANEOUS

DESCRIPTION	FEE
Notary Fee	\$ 5.00
Returned Check Charge	\$ 25.00
Copies	\$ 0.25 / per page

PARKS & RECREATION

Field Needs / Residents & Non-Residents	
Lights (rentals from 5 p.m. or later – light fee required)	\$ 25.00/ hr.
Field Preparation – lining fields, install bases, install pitching mound, soccer goals at specified dimensions	\$ 50.00/ field

Hourly Field Rentals / Residents	
AL Town Park – Field 1	\$ 50.00/ hr.
AL Town Park – Field 2	\$ 50.00/ hr.
AL Town Park – Multi-Purpose Field 1	\$ 60.00/ hr.
AL Town Park – Multi-Purpose Field 2	\$ 60.00/ hr.
AL Town Park – The Mike Gordon Pavilion (2 hour minimum)	\$ 50.00/ hr.
AL Town Hall – Multi-Purpose Field	\$ 60.00/ hr.
ALCC - Hoyt G. Castleberry Ball Field	\$ 50.00/ hr.
ALCC – Multi-Purpose Field	\$ 60.00/ hr.

Hourly Field Rentals / Non-Residents	
AL Town Park – Field 1	\$ 75.00/ hr.
AL Town Park – Field 2	\$ 75.00/ hr.
AL Town Park – Multi-Purpose Field 1	\$ 90.00/ hr.
AL Town Park – Multi-Purpose Field 2	\$ 90.00/ hr.
AL Town Park – The Mike Gordon Pavilion (2 hour minimum)	\$ 75.00/ hr.
AL Town Hall – Multi-Purpose Field	\$ 90.00/ hr.
ALCC - Hoyt G. Castleberry Ball Field	\$ 75.00/ hr.
ALCC – Multi-Purpose Field	\$ 90.00/ hr.

PARKS & RECREATION (continued)

Half-Day or Full-Day Field Rentals / Residents \$5.00/Hour Less Than Hourly Rate		
	<u>Half-Day (4 hours)</u>	<u>Full-Day (8 hours)</u>
AL Town Park – Field 1	\$ 180.00	\$ 360.00
AL Town Park – Field 2	\$ 180.00	\$ 360.00
AL Town Park – Multi-Purpose Field 1	\$ 220.00	\$ 440.00
AL Town Park – Multi-Purpose Field 2	\$ 220.00	\$ 440.00
AL Town Park – The Mike Gordon Pavilion	\$ 180.00	\$ 360.00
AL Town Hall – Multi-Purpose Field	\$ 220.00	\$ 440.00
ALCC - Hoyt G. Castleberry Ball Field	\$ 180.00	\$ 360.00
ALCC – Multi-Purpose Field	\$ 220.00	\$ 440.00
Half-Day or Full-Day Field Rentals / Non-Residents \$5.00/Hour Less Than Hourly Rate		
	<u>Half-Day (4 hours)</u>	<u>Full-Day (8 hours)</u>
AL Town Park – Field 1	\$ 280.00	\$ 560.00
AL Town Park – Field 2	\$ 280.00	\$ 560.00
AL Town Park – Multi-Purpose Field 1	\$ 340.00	\$ 680.00
AL Town Park – Multi-Purpose Field 2	\$ 340.00	\$ 680.00
AL Town Park – The Mike Gordon Pavilion	\$ 280.00	\$ 560.00
AL Town Hall – Multi-Purpose Field	\$ 340.00	\$ 680.00
ALCC - Hoyt G. Castleberry Ball Field	\$ 280.00	\$ 560.00
ALCC – Multi-Purpose Field	\$ 340.00	\$ 680.00

PARKS & RECREATION (continued)

PROGRAMS		
Program	Residents	Non-Residents
Adult Kickball (Team)	\$ 250.00	\$ 375.00
Softball Clinic	\$ 25.00	\$ 40.00
Basketball Camp	\$ 50.00	\$ 75.00
Football Camp	\$ 25.00	\$ 40.00
Volleyball Clinic	\$ 25.00	\$ 40.00
Corn Hole Tournament	\$ 50.00	\$ 75.00
Fall Youth Flag Football	\$ 50.00	\$ 75.00
Winter Basketball	\$ 50.00	\$ 75.00
Spring Baseball (JCLL) Tee ball	\$ 50.00	\$ 75.00
Spring Baseball (JCLL) 12U	\$ 80.00	\$ 120.00
Spring Baseball/Softball Senior 18U	\$ 100.00	\$ 150.00
Spring Softball (JCLL) 12U	\$ 80.00	\$ 120.00
Fall Baseball (JCLL) Tee ball	\$ 50.00	\$ 75.00
Fall Baseball (JCLL) 12U	\$ 80.00	\$ 120.00
Fall Baseball/Softball Senior 18U	\$ 100.00	\$ 150.00
Fall Softball (JCLL) 12U	\$ 80.00	\$ 120.00
Adult Softball (Team)	\$ 500.00	\$ 750.00
Winter Volleyball	\$ 50.00	\$ 75.00
Baby Sitting 101	\$ 100.00	\$ 150.00
Zumba	\$ 5.00	\$ 8.00
Yoga	\$ 5.00	\$ 8.00
Youth Cooking Class	\$ 40.00	\$ 60.00
Senior Chair Exercise	Free	Free
Senior Art Workshop	Free	Free
Adult Basketball (Team)	\$ 500.00	\$ 750.00
Summer Basketball	\$ 50.00	\$ 75.00
Introductory to Archery	\$ 40.00	\$ 60.00

PLANNING & ZONING

Land Use Public Hearing Item Fees:	
Annexation Petition – Voluntary	\$ 750.00
Comprehensive Land Use Plan Amendment	\$ 750.00
Development Agreement/Major Modification of Development Agreement	\$ 750.00
Planned Development	\$ 750.00
Rezoning/Map Amendment (per lot) – Less than 3 Acres	\$ 750.00
Rezoning/Map Amendment (per lot) – 3.01- 6.00 Acres	\$ 750.00
Rezoning/Map Amendment (per lot) – 6.01 + Acres	\$ 1,250.00 +\$ 20.00/acres
Site Plan (Subject to Town Council Review/Approval)	\$ 750.00
Special Use Permit	\$ 750.00
Text Amendment	\$ 750.00
Vested Rights	\$ 750.00
Zoning Compliance Permit Fees: (One, Two Family, and Related Accessory Uses/Structures)	
Duplex	\$ 125.00
Home Occupation	\$ 75.00
Stick Built or Modular home (detached single family)	\$ 100.00
Single Wide Manufactured Home or Double Wide Manufactured Home on an Individual Lot or in a Manufactured Home Park	\$ 100.00
Zoning Compliance Re-inspection/Zoning Certification Letter	\$ 50.00
Residential Related Accessory Uses (i.e., Solar Energy System, Tool/Storage Shed, Detached Residential Garage, Swimming Pool/Spa, Etc.)	\$ 50.00
Residential Addition (including deck, attached residential garage)/Alteration	\$ 50.00
Wall/Fence	\$ 50.00

PLANNING & ZONING (continued)

Zoning Compliance Permit Fees: Townhouse, Multi-Family, MHP, Planning Development & Non-Residential Uses Projects/Developments/ Major/Minor Utilities (unless otherwise especially referenced) and Related Accessory Uses/Structures	
Construction Value Less Than \$50,000	\$ 125.00
\$50,001 - \$100,000	\$ 250.00
\$100,001 - \$150,000	\$ 500.00
\$150,001 +	1/2 of 1% of construction cost with a maximum of \$ 2,500.00 (\$ 750.00 min)
Subdivision Review Fees:	
Minor Subdivision (1-4 lots*)	\$ 250.00 + \$ 5.00/lot
Major Subdivision (5 + lots)	\$ 1,000.00 + \$20.00/lot
Exempt Subdivision Plat	\$ 75.00
Expedited Subdivision	\$ 75.00
*Classified as a major subdivision if public utility extended	
Open Space Fees:	
Fees-in-Lieu (Major Subdivision inside Town Limits)	\$ 1,500.00/lot
Fees-in-Lieu (Major Subdivision outside Town Limits upon Petition for Annexation)	\$ 1,500.00/lot
Other Miscellaneous Fees:	
Administrative Adjustment	\$ 50.00
Floodplain Development Permit	\$ 50.00
Game Machine (Fee per Machine)	\$ 500.00
Site Plan Permit	\$ 100.00
Temporary Use Permit	\$ 50.00
Watershed Protection Permit	\$ 50.00
Reasonable Accommodation	\$ 375.00
Code of Ordinances Amendment Fees:	
Text Amendment	\$ 750.00

Board of Adjustment Fees:	
Appeals	\$ 375.00
Determination and Interpretations	\$ 375.00
Variance	\$ 475.00
Sign (Non-Exempt) Fees:	
Monument (Ground) Sign	\$ 50.00
Projecting Sign	\$ 25.00
Pylon (Freestanding) Sign	\$ 50.00
Subdivision Sign	\$ 50.00
Wall Sign	\$ 25.00
Wireless Telecommunication Facilities/Modification/Collocation Fees:	
New Tower/Modification/Collocation Application Fee	\$ 6,500.00

TAXES

DESCRIPTION	FEE
Real Estate & Personal Property	\$ 0.32/100 per valuation

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Work Session - Minutes Monday, June 9, 2025

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry

Council Member Bruton

Council Member Jackson
Council Member Buzzeli

Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Assist. Town Admin./Finance Officer
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

1 WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mullhollem called the meeting to order at 6:31 p.m in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2 ANSWERS TO CITIZENS' QUESTIONS FROM PUBLIC HEARING:

a)

Mr. Bryan Chadwick, Town Administrator, explained the rationale for putting money into the fund balance for this year's budget.

Mayor Mulhollem echoed the explanation offered by Mr. Chadwick and explained that the Town had been lucky over the years to receive funding from grants for certain projects. Mr. Chadwick elaborated on why the fund balance should be replenished and said that the Town should be saving money for potentially new services it may have to provide in the next several years.

Mayor Mulhollem reminded those in attendance that Archer Lodge was incorporated to adapt to incoming development and manage growth. Mayor Mulhollem elaborated on zoning changes in the area.

Mayor Mulhollem noted that the Parks and Recreation Department has been and will continue to be a priority for the Council moving forward. He shared that in his opinion, he hopes to continue to see the department grow to reach its full potential. Mayor explained the process of how the department began and that they were grateful to receive grants to help fund the park and he shared that department offerings have grown exponentially since the department's founding. The mayor said that parks and recreation was consistently one of the top priorities of residents when the Town was incorporated.

Mr. Chadwick addressed questions concerning the training and meetings budget item. Mr. Chadwick expressed the need for staff attendance at these trainings as some are required by law and ensure staff is up to date on pertinent information relevant to their positions. He shared that these training courses are for the overall benefit of not just the staff themselves but for the Town as well.

Mr. Chadwick discussed expenses related to landscaping and what the Town handles versus what is contracted. Mr. Chadwick explained that Town staff maintains grass at the park. Mr. Chadwick noted that it is more expensive to hire another staff member than to contract for other landscaping needs.

Mr. Chadwick presented information about parks and recreation fees and that fees paid by non-residents of the Town versus residents of the Town are 50% higher. Mayor Mulhollem questioned Chris Allen, Parks and Recreation Director, about the feasibility of having registration solely open to residents for one to two weeks before being opened for nonresident registration. Mr. Allen shared that around 75% of participants in programs are nonresidents and that changing registration timeframes for residents would not be an issue. Council Member Bruton agreed with Mayor Mulhollem concerning the introduction of a one to two week waiting period for nonresidents. Bruton asked Mr. Allen if Flowers has an organized parks and recreation department and said that she doesn't feel that Archer lodge should be footing the bill for nonresidents to use parks and recreation facilities. Mr. Allen shared that programs in flowers are run through the YMCA.

Council Member Jackson and Mayor Pro-Tem Castleberry agreed that registration should be opened early for residents. Mr. Jackson shared that he feels that the Town needs non-residents to bring in revenue as well as increase participation. Mr. Allen shared that no child has ever been turned away from a program, even if registered late.

Mr. Chadwick discussed the recommendation that 401k benefits be decreased from 8% to 6% and confirmed that it had been placed into the budget ordinance draft.

Mayor Mulhollem explained the current tax structure and that the last tax increase was done to help fund the park. Mayor Mulhollem explained the tax structure for the fire department. Mr. Chadwick answered questions related to fees and explained that the fire department would be meeting tomorrow to make decisions related to the fire tax. Mr. Wilson asked if changes to the fire tax would have an impact on the ad valorem tax. Mr. Chadwick explained that changes to the fire tax would not have an impact on ad valorem tax.

Mr. Chadwick briefly addressed concerns from citizens about reducing benefits for employees. Mayor Mulhollem spoke about the potential impacts of reducing the benefits package.

3 BUDGET DISCUSSIONS CONTINUED:

a)

Mayor Mulhollem thanked staff for changing the budget process and suggested using the new process in coming years as he felt allowing for time between public comment and budget passage was beneficial.

Mayor Mulhollem spoke about the current tax rates and the revenue that comes from them. He expressed pride in the low levels of debt owed by the Town. Several members of Council shared remarks on the effects of Johnston County's recent property tax reevaluation and expressed concerns regarding the potential impacts especially for residents that will be left to pay more annually.

Mayor Mulhollem brought up that the Town should put money into fund balance due to potential changes in services provided by the county and other municipalities. Mr. Chadwick shared that Clayton animal control staff has been incredibly busy and that they may need to stop providing services for the Town sooner than the original timeline suggested. A brief discussion prompted by Council Member Bruton occurred concerning a potential change to the 2¢ tax and whether reserves could be replenished via this method.

Mayor Mulhollem raised concerns from residents about foul balls at the park and the safety concerns associated with them. He raised the point that this is not addressed in the current version of the budget ordinance.

Council member Jackson suggested that Council begin to discuss items of concern in the proposed budget. Mayor Mulhollem agreed and prompted Council to begin raising specific concerns. Council Member Buzzelli raised concerns again regarding tax levels. Discussion then occurred amongst Council regarding the impact of decreasing the tax rate.

Council Member Buzzelli suggested the possibility of the parks and recreation department taking over landscaping at Town hall. He also brought up concerns regarding the budget for training and website revitalization. Council then revisited a conversation centering around the impact of lowering or maintaining the tax rate. Discussion then followed concerning the amount budgeted for trainings for staff and Council.

Council Member Buzzelli revisited having the parks and recreation department handle landscaping for Town Hall. Conversation then took place between Council and staff concerning benefits and pay for parks and recreation department employees. Several Council Members concurred that the Town could look into potentially having parks and recreation staff handle landscaping for Town Hall.

Members of Council stressed the importance of putting funds into reserves in the case of an emergency. Ms. Kim Batten, Assistant Town Administrator/Finance Officer, elaborated on the importance of having reserves and gave examples from the past in which the Town had to use reserve funds.

Council member Wilson shared that he supported the budget as is. Council Member Jackson shared that he was comfortable moving forward with finding potential areas in the budget to cut if that was what other Members of Council wished to do. Council Member Buzzelli shared his concerns about approving the budget ordinance as recommended. Council and staff then had conversations comparing the proposed budget ordinance to the budget from the previous fiscal year.

Council Member Wilson left the meeting prior to adjournment at 9:58 p.m. Mayor Pro-Tem Castleberry expressed that he was comfortable with the budget as proposed. Council Member Bruton voiced that she was not comfortable with the budget as proposed.

4 ADJOURNMENT:

- a) With no further business, Mayor Mulhollem adjourned the meeting at 10:21 p.m.**

Moved by Council Member Jackson
Seconded by Council Member Buzzelli

Approved to adjourn the meeting at 10:21 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Jenny Martin, Town Clerk



**Special Meeting - Minutes
Monday, June 30, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Buzzelli
Council Member Wilson

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Kim P. Batten, Town Administrator/Finance Director
Jason Kress, Town Planner
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk

COUNCIL ABSENT:

None

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:32 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance to the US Flag.

2. APPROVAL OF AGENDA:

a) No Changes or Additions

Council Member Bruton asked that the agenda be amended to include a period of public comment. Debate occurred and the motion to approve the agenda was dispensed with.

Moved by Council Member Wilson
Seconded by Council Member Jackson.

Approved the Agenda

CARRIED 3 to 2 (Council Members Bruton and Buzzelli Opposed)

3. ORGANIZATIONAL ITEMS

a) Welcome Benjamin King, Archer Lodge's new Deputy Town Clerk

Bryan Chadwick, Town Administrator, introduced Benjamin to Council and member of the public.

3

b) Administration of Oath of Deputy Town Clerk Ben King by Mayor Matthew B. Mulhollem.

Mayor Mulhollem administered the oath of office to the Town's new Deputy Town Clerk Benjamin King. Benjamins mother held the Bible and Mr. Chadwick took pictures of the occasion.

[Benjamin King Oath Signed](#)

4. DISCUSSION AND POSSIBLE ACTION ITEMS:

a) Discussion and Possible Action of Adopting the Annual Budget Ordinance for Fiscal Year 2025-2026

Mr. Chadwick updated Council on matters related to the budget. He let Council know that Johnston County has reduced the fire district tax rate from 14¢ to 11.5¢. Due to the changes made at the county, Mr. Chadwick briefed Council on his updated recommended budget. Mr. Chadwick recommended that the Town's tax rate be reduced from 32¢ to 30¢. Several Members of Council asked for clarification and Mr. Chadwick along with Kim Batten, Assistant Town Administrator/Finance Officer, elaborated on changes the tax reduction will have on the budget and answered questions from Council. Council Members Bruton and Buzzelli expressed that they did not support the budget as recommended.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Approved to Accept the Budget as Recommended by Mr. Chadwick.

CARRIED 3 to 2 (Council Members Bruton and Buzzelli Opposed)

5. ADJOURNMENT:

a) Having no further business, Mayor Mulhollem called for a motion to adjourn.

Moved by Council Member Jackson
Seconded by Council Member Wilson

Approved to adjourn meeting at 6:53 p.m.

CARRIED UNANIMOUSLY

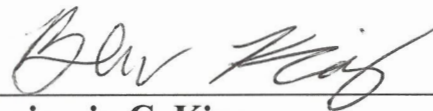
Matthew B. Mulhollem, Mayor

Ben King, Deputy Town Clerk

**OATH OF OFFICE FOR THE
DEPUTY TOWN CLERK
TOWN OF ARCHER LODGE**

I, **Benjamin C. King**, do solemnly swear (or affirm) that I will support the Constitution of the United States of America; that I will be faithful and bear true allegiance to the State of North Carolina, and to the Constitutional powers and authorities which are or may be established for the government thereof; and that I will endeavor to support, maintain and defend the Constitution of said State, not inconsistent with the Constitution of the United States, to the best of my knowledge and ability, so help me God.

I, **Benjamin C. King**, do solemnly swear (or affirm) that I will support and maintain the Constitution and laws of the United States, and the Constitution and laws of North Carolina not inconsistent therewith, and that I will faithfully discharge the duties of my office as **Deputy Town Clerk**, so help me God.



Benjamin C. King

Sworn to and subscribed before me
this 30th day of June 2025.



Matthew B. Mulhollem
Mayor
Town of Archer Lodge





**Regular Council - Minutes
Monday, July 14, 2025**

COUNCIL PRESENT:

Mayor Mulhollem
Mayor Pro Tem Castleberry
Council Member Bruton
Council Member Jackson
Council Member Buzzelli

STAFF PRESENT:

Bryan Chadwick, Town Administrator
Marcus Burrell, Town Attorney
Jason Kress, Town Planner
Kim P. Batten, Assistant Administrator/Finance Officer
Chris Allen, Parks & Recreation Director
Jenny Martin, Human Resources Officer/Town Clerk
Ben King, Deputy Town Clerk

COUNCIL ABSENT:

Council Member Wilson (Joined via Phone for Discussion)

MEDIA PRESENT:

None

Page

1. WELCOME/CALL TO ORDER:

a) Invocation

Mayor Mulhollem called the meeting to order at 6:31 p.m. in the Jeffrey D. Barnes Council Chambers located at 14094 Buffalo Road, Archer Lodge, NC and declared a quorum present. Council Member Jackson offered the invocation.

b) Pledge of Allegiance

Mayor Mulhollem led in the Pledge of Allegiance of the US Flag.

2. APPROVAL OF AGENDA:

a) Council Member Buzzelli requested that the agenda be amended to include "Meeting Minutes and Agendas" under the Discussion and Possible Action Items section.

Moved by Council Member Buzzelli
Seconded by Council Member Bruton

Approved the Agenda, as Amended, to Include Discussion and Possible Action Item 7 (c) Meeting Minutes and Agendas under the Discussion and Possible Action Items Section

CARRIED UNANIMOUSLY

3. CONSENT AGENDA:

- a) Approval of Minutes:**
 - 01 Apr 2024 Regular Meeting Minutes**
 - 15 Apr 2024 Work Session Minutes**
 - 05 May 2025 Regular Meeting Minutes**
 - 02 Jun 2025 Regular Meeting Minutes**

Moved by Council Member Jackson
Seconded by Council Member Buzzelli
Approved the Consent Agenda

CARRIED 3-1 (Bruton Opposed)

4. ORGANIZATIONAL ITEMS

a) Meeting Minutes Update

Bryan Chadwick, Town Administrator, shared an update with Council concerning meeting minutes and the efforts made by Staff to get the Town caught up. Mr. Chadwick relayed that the Town has approved 18 meeting minutes in the current year and that there are still 26 outstanding meeting minutes to be approved. Mr. Chadwick explained to Council that the expectation and goal among Staff is that all meeting minutes will be caught up within the next three months.

5. OPEN FORUM/PUBLIC COMMENTS:

(Maximum of 30 minutes allowed; 3 minutes per person)

- a) Mr. Ronnie Correia, President of the Johnston County Little League, thanked Town Staff for their hard work for making the Little League tournament a success. Mr. Correia specifically wanted to thank Parks and Recreation Staff members Blake McLean and Marcus Cameron for their work in making the baseball fields look fantastic. Mr. Correia also relayed to Council his wishes that any funds that the Town receives from the parking donations collected be put back towards the park.**

Mayor Mullhollem thanked Staff for their work on the baseball fields and thanked Mr. Correia for the time he dedicates to Little League.

- b) Ms. Sonia Wolk shared her thoughts as they related to the Town Budget process and how Staff and Council behaved during that process. Ms. Wolk relayed that she was not pleased with the way that Staff and the board conducted themselves during the budget process and that she wished more attention was spent on the concerns of residents.**

- c) Ms. Francine Echols, Planning Board Member, spoke about the budget process and shared that she felt there should have been more budget cuts included in the adopted budget. She also spoke about her feelings about Staff and their behavior during the budget process. Ms. Echols spoke in support of the elderly and children in the community and expressed her concern for how the budget might potentially affect them.**

6. RECOGNITION/PRESENTATION:

- a) Recognition of Bryan Chadwick, Town Administrator, for Two Years of Service to the Town of Archer Lodge**

Jenny Martin, Human Resource Officer/Town Clerk, presented Mr. Chadwick with an engraved mug in recognition of his two years of service to the Town. Mayor Mulhollem thanked Mr. Chadwick for his service to the Town.

b) Recognition of Chris Allen, Director of Parks and Recreation, for Two Years of Service to the Town of Archer Lodge

Jenny Martin, Human Resource Officer/Town Clerk, presented Mr. Allen with an engraved mug in recognition of his two years of service to the Town. Mayor Mulhollem thanked Mr. Allen for his service to the Town.

c) Recognition of Chris Cipriani, Planning Board Member, for His Service to the Town of Archer Lodge Planning Board

Jason Kress, Town Planner, presented Mr. Cipriani with a plaque in recognition of his service to the Town's Planning Board. Mayor Mulhollem thanked Mr. Cipriani for his service to the Town. Mr. Cipriani shared that he resigned his seat on the Planning Board due to hearing issues and expressed that he enjoyed his time on the board.

7. DISCUSSION AND POSSIBLE ACTION ITEMS:

8 - 249

a) Discussion and Possible Action on a Resolution Approving Local Record Retention and Disposition Schedules

Ben King, Deputy Town Clerk, shared with Council about the retention schedules and the purpose that they would serve for the town. Mr. King informed Council that the schedules are provided by the State of NC and explained what the process is for the Town to approve them. Council Member Bruton shared that the power had been out at her house which made it difficult to access the schedules before the meeting occurred. Council Member Buzzelli asked a clarifying question related to whether the documents set to be destroyed have to be approved by Council first, which was answered by Mr. King. It was agreed by Council upon the suggestion by Council Member Bruton that this item would be moved to the August 4th Regular Council meeting so that Members of Council would have ample time to be able to review the documents before voting on them.

[Resolution Approving Local Record Retention and Disposition Schedules](#)
[Local Program Standards Schedule](#)
[Local General Standards Schedule](#)

250

b) Discussion and Possible Action on a Request for Proposal for Audit Services for FY 2025 Through FY 2028

Kim Batten, Assistant Town Administrator/Finance Officer, explained the purpose of the request for proposal and elaborated on the process for the Audit. Council Member Bruton asked for clarification on the length of the contract, which Ms. Batten answered. Council Member Bruton then asked about past conversations centered around using the same auditor and whether there were drawbacks to doing so. Mr. Chadwick along with Ms. Batten explained the benefit of using an auditor the Town has used in the past. Mayor Mulhollem entertained a motion to approve the recommended action.

Moved by Council Member Jackson
Seconded by Council Member Castleberry

Approved to Direct Staff to Engage with Dale Place and Scott May to Perform an Audit for the Town for FY 2025 and the Subsequent Four Years.

CARRIED UNANIMOUSLY

[May & Place Proposal for Audit Services](#)

c) Meeting Minutes and Agendas

Council Member Buzzelli expressed his appreciation to Mr. Chadwick for his

earlier report on the meeting minutes and elaborated that he felt that Council needed to hold staff accountable. Following Council Member Buzzelli's motion related to meeting minutes, Council debated the benefits and drawbacks of approving the motion. Council Member Bruton spoke in favor of the motion and relayed that she thought the minutes were something important and that voting for the motion showed residents that this was a Council priority. Council Member Castleberry relayed that he was not in favor of the motion due to the short timeframe of the introduction of the motion.

Council Member Buzzelli shared a brief story about a neighbor and their concern for not having access to meeting agendas. Following Council Member Buzzelli's motion related to meeting agendas, Council debated the benefits and drawbacks of approving the motion. Several Council Members spoke in support of the motion and made remarks related to making sure that Council and Staff would be flexible if time constrained items needed to be added to the agenda the day of a meeting.

Moved by Council Member Buzzelli
Seconded by Council Member Jackson

Approved that Meeting Minutes for all Meetings be Released to all those who have Approval Authority of the Meeting Minutes Within One Calendar Week from when the Meeting took place.

Furthermore, Access to Current and Archived Meeting Minutes, in a Searchable PDF Format, is to be Made Available to the Public via a Link on the Town Website Splash Screen Within One Week of the Minutes Being Approved.

Furthermore, the Time-constrained Requirement for Delivering Meeting Minutes be Entered into the Job Requirements of the Clerk, as Well as the Performance Evaluations of the Clerk and all their Supervisors and that the Change is to be Made Before the Next Regular Meeting.

Furthermore, Meeting Minutes are to be Marked as Draft and Once Voted on and Approved the Draft Marking is to be Replaced with the Marking Approved Along with the Date that they were Approved.

CARRIED 3-1 (Castleberry Opposed)

Moved by Council Member Buzzelli
Seconded by Council Member Jackson

Approved that the Agenda for all Meetings be Released to all those Involved with the Meetings and to the Public at least One Week Before the Meeting takes place.

Furthermore, the Time-constrained Requirement of Delivering the Meeting Agenda be Entered into the Job Requirement of the Clerk, as well as the Performance Evaluations of the Clerk and all their Supervisors. This Change is to be Made Before the Next Regular Meeting.

Furthermore, Access to Current and Archived Agendas is to be Made Available to the Public via a Link on the Town Website Splash Screen.

CARRIED UNANIMOUSLY

8. TOWN ATTORNEY'S REPORT:

- a) **Marcus Burrell, Town Attorney, gave Council a review of what is legally required of the Town with regards to public hearings and public notice during the budget process.**

9. TOWN ADMINISTRATOR'S REPORT:

- a) **Mr. Chadwick commended Marcus Cameron, Chris Allen, and Blake McLean for their hard work in maintaining the baseball fields at the**

Town Park during the Little League tournament.

10. ASSISTANT TOWN ADMINISTRATOR/FINANCE OFFICER’S REPORT:

251 - 253

a) Interim Financial Reports for June 2025

Ms. Batten shared an interim summary for all funds ending June 6, 2025. She shared that we are still operating in the previous fiscal year and that the Town would not have the true numbers for accounts until the Audit is completed. For the actual to date net difference between revenues and expenditures in the General Fund is around \$111,580.

Regarding the Capital Reserve Fund 30, Ms. Batten mentioned that the only transaction for the month is the investment earnings.

Regarding the Park Reserve Fund 31, Ms. Batten mentioned that the only activity has been the investment earnings and the \$0.02 transfer from the taxes. The operating budget for the Park Reserve Fund 31 is \$37,893.

Regarding the Public Safety Reserve Fund 32, Ms. Batten mentioned that the only activity has been investment earnings.

When comparing revenues in June 2024 with June 2025 in the General Fund, Ms. Batten mentioned that we are at around \$2,361,443 less this year. Ms. Batten stated that the expenditures for this year was around \$572,000 less than last year.

[JUNE 6, 2025 - ALL FUNDS](#)

[JUNE 6, 2025 - YTD COMP](#)

11. HUMAN RESOURCES OFFICER/TOWN CLERK’S REPORT:

a) Jenny Martin, Human Resources Officer/Town Clerk, informed Council that a conditional offer had been made for both the supervisor and athletic aide positions for the Parks and Recreation Department. Ms. Martin then gave an update on the benefits offered for employees and shared that the Town had found a new provider and that she had worked to get everyone enrolled in a timely fashion.

Mr. King reminded Council about the open application for the available seat on the Planning Board and shared that the Town had received two applications.

12. TOWN PLANNER'S REPORT:

254

a) May Animal Control Stats

Jason Kress, Town Planner, gave a brief update on the frequency of animal control related services for the month of May.

[May Animal Control Report](#)

255

b) June Animal Control Stats

Jason Kress, Town Planner, gave a brief update on the frequency of animal control related services for the month of June.

[June Animal Control Report](#)

c) Code Enforcement Update

Jason Kress, Town Planner, gave a brief update on the frequency of code enforcement related services.

256

d) Planning and Zoning FY25 Year-End Report

Jason Kress, Town Planner, updated Council about the frequency of planning services as well as provided updates to Council about several projects that he has been working on. Council Member Bruton asked Mr. Kress about the timeline for the Comprehensive Land Use Plan and Mr. Kress clarified why the delay has occurred.

[7.14.25 Zoning Permit Report for FY2025](#)

13. PARK AND RECREATION DIRECTOR'S REPORT:

- a) **Chris Allen, Parks and Recreation Director, echoed the support for employees Marcus Cameron and Blake McLean for their hard work in maintaining the baseball fields at the Town Park during the Little League tournament. Mr. Allen informed Council about the upcoming registrations for programs offered by the Town. He then answered questions from Council regarding the Little League Tournament and how the Town will handle food truck parking in the future.**

14. MAYOR'S REPORT:

- a) **Mayor Mullhollem congratulated the Archer Lodge Community Center for a great Family Fun Day on July 5th. Mayor Mullhollem also congratulated Parks and Recreation Staff and the Johnston County Little League for their hard work that went into the successful baseball tournament over the weekend. He then informed residents of the Elderly or Disabled Tax Exclusion form available through Johnston County.**

15. COUNCIL MEMBERS' REMARKS:

- a) **Council Member Wilson expressed his gratitude to Staff for the support they have provided to himself and his wife during their health troubles. He shared some of the health issues he and his wife have been experiencing. Mayor Mulhollem wished Council Member Wilson well and said that he and his wife would be in the thoughts and prayers of Council Members**

- b) **Council Member Jackson commended Brad Palmer for his work in the community and for his service as Commander for the Smithfield VFW Post. He then expressed his appreciation for Jason Kress and the hard work he does for the Town.**

- c) **Council Member Buzzelli echoed the support for Mr. Kress and Mr. Palmer. He then let residents know about the Archer Lodge Community Center Senior Activities Morning (SAM). Council Member Buzzelli also informed residents about the monthly community dinner at the Archer Lodge Community Center and implored community members to attend.**

d) **Council Member Castleberry expressed gratitude to Parks and Recreation Staff for their hard work in maintaining the baseball fields at the Town park during the Little League Tournament. He then shared with the public that he would be attending the Johnston County Economic Development Advisory Board meeting Wednesday. Council Member Castleberry complimented his wife and thanked her for helping him during his health troubles. Lastly, he shared that the fireworks for the Family Fun Day on July 5th were fantastic and shared that residents from other towns had come to Archer Lodge just to see the fireworks.**

e) **Council Member Bruton expressed gratitude to Parks and Recreation Staff for their hard work in maintaining the baseball fields at the Town Park during the Little League Tournament. She then shared concerns about emails and making sure that emails are up to standards with NC public record laws.**

16. CLOSED SESSION: § 143-318.11

a) **Attorney Burrell advised Council to enter into Closed Session as permitted by § 143-318.11(a)(3)(6).**

Moved by Council Member Jackson
Seconded by Council Member Bruton

Approved to Enter into Closed Session at 8:23 p.m.

CARRIED UNANIMOUSLY

17. RETURN TO OPEN SESSION:

a) **Mayor Mulhollem called for a motion to return to Open Session.**

Moved by Council Member Jackson
Seconded by Council Member Castleberry

Approved to Return to Open Session at 9:31 p.m.

CARRIED UNANIMOUSLY

18. ADJOURNMENT:

a) **Having no further business, Mayor Mulhollem called for a motion to adjourn.**

Moved by Council Member Jackson
Seconded by Council Member Castleberry

Approved to Adjourn Meeting at 9:31 p.m.

CARRIED UNANIMOUSLY

Matthew B. Mulhollem, Mayor

Ben King, Deputy Town Clerk



**TOWN OF ARCHER LODGE
RESOLUTION APPROVING LOCAL RECORD
RETENTION AND DISPOSITION SCHEDULES**

WHEREAS, in accordance with N.C. Gen. Stat. § 121-5(c) and § 132-8, the State Archives of North Carolina of the Department of Natural and Cultural Resources has prepared General and Program Records Schedules for Local Government Agencies to use when managing the records in their offices; and

WHEREAS, local governing bodies must approve such schedules before the same may be used to authorize the destruction of public records and must rely on such schedules when making decisions concerning the preservation and disposition of official records; and

WHEREAS, the Town Attorney has reviewed the current General Records Schedules for Local Government Agencies as well as the current Program Records Schedule for Local Government Agencies together with all relevant Amendments thereto and has collaborated with the appropriate town staff to supplement said schedules, where required, with specific agency policies; and

WHEREAS, the result of said collaboration are the retention schedules attached hereto as Exhibit A and Exhibit B, which the Town Attorney recommends this Council adopts; and

WHEREAS, this Council is of the opinion that it is in the best interests of the citizens and residents of The Town of Archer Lodge to approve the retention schedules attached hereto as Exhibit A and Exhibit B.

NOW, THEREFORE, BE IT RESOLVED that the Archer Lodge Town Council hereby adopts the retention schedules attached hereto.

DULY ADOPTED ON THIS 14TH DAY OF JULY 2025 WHILE IN REGULAR SESSION.

ATTEST:

Jenny Martin
Town Clerk

Matthew B. Mulhollem
Mayor

RECORDS RETENTION AND DISPOSITION SCHEDULE

PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

CONTENTS

Approval	iv
Front Matter	
Executive Summary	v
Legend for Records Schedule	vi
Records Retention and Disposition Schedule	
Standard 10: Airport Authority Records	1
Standard 11: Animal Services Records	3
Standard 12: Code Enforcement and Inspection Records	5
Standard 13: Emergency Medical Services and Fire Department Records	12
Standard 14: Parks and Recreation Records	16
Standard 15: Planning and Regulation of Development Records	19
Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records	25
Standard 17: Public Transportation Systems Records	31
Standard 18: Public Utilities and Environmental/Waste Management Records	34
Standard 19: Street Maintenance, Public Works, and Engineering Records	46
Standard 20: Law Enforcement Records (excluding Sheriff's Office)	53
Standard 21: Tax Records (for municipalities)	73
Appendix	
Managing Public Records in North Carolina	A-1
Audits, Litigation, and Other Official Actions	A-5
Transitory Records	A-6
Destruction of Public Records	A-8
Sample Destructions Log	A-10
Electronic Records: E-mail, Born Digital Records, and Digital Imaging	A-11
Geospatial Records	A-13
Security Preservation Record Copies	A-15
Disaster Assistance	A-17
Staff Training	A-18
Request Forms	
Request for Change in Records Schedule	A-19
Request for Disposal of Unscheduled Records	A-20
Request for Disposal of Original Records Duplicated by Electronic Means	A-21
File Plan	A-22
Index	A-23

Program Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 Program Records Schedule: Local Government Agencies**:

10. Airport Authority Records
11. Animal Services Records
12. Code Enforcement and Inspection Records
13. Emergency Medical Services and Fire Department Records
14. Parks and Recreation Records
15. Planning and Regulation of Development Records
16. Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records
17. Public Transportation Systems Records
18. Public Utilities and Environmental/Waste Management Records
19. Street Maintenance, Public Works, and Engineering Records
20. Law Enforcement Records (excluding Sheriff's Offices)
21. Tax Records (for municipalities)

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

N.C. Gen. Stat. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, N.C. Gen. Stat. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends.*” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends.*” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends.*”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by these schedules; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.


Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. These schedules supersede previous versions of these schedules and any localized amendments; they are to remain in effect from the date of approval until they are reviewed and updated.

² Ibid.

APPROVAL RECOMMENDED


Municipal/County Clerk or Manager
Title: _____



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: _____



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

County/Municipality: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the *General Records Schedule: Local Government Agencies* and, therefore, are not listed separately here.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.
- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a [Request for Disposal of Unscheduled Records](#) (page A-19) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or Includes confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTIONS, page A-5.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 10: PROGRAM OPERATIONAL RECORDS – AIRPORT AUTHORITY RECORDS**

Official records and materials created and accumulated incidental to the operation of a county or municipal airport.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.01	ACCESS CONTROL RECORDS Records concerning employee or contractor access to facilities or resources.	Destroy in office 1 year after expiration.	
10.02	AIR SPACE CONSTRUCTION Applications to construct structures which may obstruct flight space. Includes correspondence and related records.	Destroy in office after 5 years.	
10.03	AIRFIELD INSPECTION Records concerning airfield inspections on runway conditions, fueling agents, fire and rescue facilities, ground vehicle control and other airport condition information.	Destroy in office after 1 year.	Authority/Retention: 14 CFR 139.301
10.04	AIRPORT MASTER RECORD Federal Aviation Administration (FAA) form 5010 documenting basic information concerning airports.	Destroy in office when superseded or obsolete.	

10: Airport Authority

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.05	LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS Records documenting local government and airport authority land use and development planning.	Retain in office permanently.	
10.06	RADIO LOGS Records of radio calls received and placed.	Destroy in office after 1 year.	

10: Airport Authority

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 11: PROGRAM OPERATIONAL RECORDS – ANIMAL SERVICES RECORDS**

Records created and received during the conduct of animal services programs.

NOTE: Some records are covered by General Records Schedule: Local Government Agencies and, therefore, are not listed separately here. See Reference (Reading) File and Reports and Studies (Administration and Management Records).



ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.01	ANIMAL ABUSE AND CRUELTY RECORDS Includes complaints, citations and/or compliance orders, and other related records.	Destroy in office after 5 years.*	See G.S. 14-360 for definition of animal cruelty.
11.02	ANIMAL COMPLAINT RECORDS Includes complaints of animal nuisances.	Destroy in office after 3 years.*	
11.03	ANIMAL CONTROL RECORDS Records of animal control calls. Includes information regarding animal bites, animals received from residents, strays caught, animals taken to shelter or returned to owner, use of tranquilizer guns, and other related records. Also includes citations and/or compliance orders issued to animal owners for violations of government ordinances.	a) Destroy in office records concerning dangerous animals when known dead or after 10 years. b) Destroy in office animal control citations and compliance orders after 3 years.* c) Destroy in office remaining records after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.04 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Confidentiality: G.S. 132-1.2 (2)
11.05 	ANIMAL SHELTER RECORDS Records of animals impounded at the shelter, including date of impoundment, length of impoundment, disposition of animal, and any other information required by rules adopted by the State Board of Agriculture. Also includes certificates of animal release (e.g., adoption, reclaim, transfer, return to field) and owner contact records.	Destroy in office 3 years after date of impoundment.	Authority/Retention: G.S. 19A-32.1(j) Confidentiality (for specific counties): G.S. 132-1.15
11.06	CONTROLLED SUBSTANCE EUTHANASIA LOG Includes amount of controlled substances used.	Destroy in office after 2 years.	Retention: 21 CFR 1304.04
11.07	HISTORIES OF PET OWNERS Records concerning information for each animal owner who violates government ordinances. Includes complaint forms and other related records.	Destroy in office after 3 years.*	
11.08	RABIES VACCINATION RECORDS Includes rabies vaccination certificates submitted to agency by area veterinarians.	Destroy in office after 3 years.	Authority: G.S. 130A-189

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.


± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 12: PROGRAM OPERATIONAL RECORDS – CODE ENFORCEMENT AND INSPECTION RECORDS**

Official records and materials created and accumulated during the conduct of local government code enforcement and inspection programs.

NOTE: Some records are covered by the General Records Schedule: Local Government Agencies and, therefore, are not listed separately here.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.01	AIR POLLUTION SOURCE INFORMATION Includes records for facilities which are no longer operational.	Destroy in office after 2 years.*	
12.02	 BLUEPRINTS AND SPECIFICATIONS Records concerning blueprints and specifications of local government owned buildings and facilities, or drawings submitted when applying for a building permit for new construction. Includes as-built plans and related records concerning approved changes or used in determining code compliance and enforcement of building code. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain agency blueprints and specifications for life of structure. b) Destroy in office commercial blueprints and specifications 1 year after completion of project. c) Destroy in office residential blueprints and specifications when reference value ends.± Agency Policy: Destroy in office after <u>7 years</u>	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “destroy when reference value ends.” Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.03	<p>BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS Records documenting applications for permits from property owners to erect new structures or manufactured homes, or to make structural modifications, demolition, fire permits, or the installation of plumbing, electrical, or mechanical systems. Includes permits, inspection reports, inspector's worksheets, inspection requests, denial reports, sketches, correspondence (including e-mail), and contractor change forms.</p>	<p>a) Destroy in office permits, applications, and inspection reports (or worksheets) 6 years after Certificate of Occupancy is issued or project is complete (inactive).</p> <p>b) Destroy in office Certificate of Occupancy 6 years after permit is expired.</p> <p>c) Destroy in office remaining records, including applications for which a permit was never issued, when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>90 Days</u></p>	
12.04	<p>CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS Records concerning decontamination compliance.</p>	Destroy in office 3 years after documented decontamination is complete.	
12.05	<p>DROUGHT CONTINGENCY PLANS Includes water conservation plans in the event of a drought.</p>	Destroy in office when superseded or obsolete.	
12.06	<p>EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES Includes settled legal matters and penalties.</p> <p>SEE ALSO: Violations: Building and Housing, below.</p>	Destroy in office 6 years after settlement.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.07	EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans as well as revisions and addenda.	a) Destroy in office approved plans 6 years after approval or last revision and/or addendum. b) Destroy in office non-approved plans after 3 years.	
12.08	EXEMPTION (VARIANCE) RECORDS Records concerning exemptions and variances concerned with the installation of water, sewer, gas, or electric lines.	a) Destroy in office 5 years after expiration.* b) Destroy in office records for which an exemption or variance was not issued after 3 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.09	GOING-OUT-OF-BUSINESS LICENSES Records concerning licenses granted to business to hold going out of business, water and smoke damage, and distress sales.	Destroy in office 1 year expiration.	
12.10	GROUNDWATER MONITORING RECORDS Includes all groundwater monitoring wells and associated groundwater surface elevations.	Destroy in office after 5 years.*	Authority: 15 NCAC 2C .0100
12.11	ILLEGAL DUMPING FILE Records concerning illegal dumping complaints received. SEE ALSO: Violations: Solid Waste Management, below.	Destroy in office after 5 years.*	
12.12	INSPECTIONS Inspections conducted by local government agencies concerning enforcement of state and local laws, codes, and ordinances.	Destroy in office after 6 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.13	LEAD AND COPPER COMPLIANCE RECORDS Includes all monitoring records required by federal, state, and local regulations.	Destroy in office after 12 years.*	Retention: 40 CFR 141.91
12.14	LANDFILL TONNAGE AND COST FILE	Destroy in office after the 5 year reporting period is complete.	
12.15	PERMITS: CONSTRUCTION Records documenting applications and permits regarding sign installation, fencing, swimming pools, driveways, or similar activity required by local ordinance. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Miscellaneous (Non-Building) Applications, Licenses, and Permits (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 3 years after completion of project. b) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>90 Days</u>	
12.16	 PERMITS: PUBLIC UTILITIES PROJECTS Records documenting permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain in office approval letters and supporting documentation permanently. b) Destroy in office permits 6 years after expiration, cancellation, revocation, or denial.*	Authority: 40 CFR 122.28 15A NCAC 18C .0300 Confidentiality: 15A NCAC 02H .0115

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.17	RECREATIONAL VEHICLE REGISTRATION RECORDS Records concerning issuance of registrations/decals for recreational vehicles. Includes, but is not limited to, golf carts, canoes, and mopeds as well as proof of insurance and renewals.	Destroy in office 1 year after expiration.*	
12.18	UNSAFE BUILDINGS FILE Records documenting inspections and notifications to owners of unsafe conditions relative to a particular structure. SEE ALSO: Violations: Building and Housing, below.	Destroy in office after 6 years provided all issues have been resolved.*	
12.19	VALVE OPERATION FILE	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>obsolete or superseded</u>	
12.20	VIOLATIONS: BUILDING AND HOUSING Records documenting violations of building and fire code, minimum housing, and erosion and sediment control. Includes complaints, summons, notices, appeals, and other information created or compiled during the course of investigation and resolution of each alleged violation. SEE ALSO: Water Analysis, below.	a) Destroy building code violations in office 6 years after verification of correction. b) Destroy remaining records in office 3 years after verification of correction.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.21	VIOLATIONS: SOLID WASTE MANAGEMENT Includes complaints, notices of violations, citations, investigation records, court documents, and other related records issued by solid waste environmental enforcement programs.	Destroy in office 7 years after resolution of case.*	
12.22	VIOLATIONS: WATER CONSERVATION Records concerning notices of water conservation violations.	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>1 year</u>	
12.23	WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS	Destroy in office after 5 years.*	Authority: 15A NCAC 2B .0505
12.24	WASTEWATER QUALITY ANALYSIS RECORDS	a) Destroy in office analysis reports after 3 years.* b) Destroy in office monitoring and calculation sheets after 1 year.*	Authority: 15A NCAC 2B .0505

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.25	<p>WATER ANALYSIS Records concerning bacteriological, chemical, radiological, and physical analyses and climatological observations as well as records of actions taken to correct violations.</p> <p>SEE ALSO: Violations: Building and Housing and Violations: Water Conservations, above.</p>	<p>a) Destroy in office records of chemical and radiological analysis after 10 years.</p> <p>b) Destroy in office records of bacteriological and turbidity analysis after 5 years.</p> <p>c) Destroy in office records of actions taken to correct violations 3 years after last corrective action taken.</p> <p>d) Destroy in office remaining records after 5 years.</p>	<p>Retention: 40 CFR 141.33 15A NCAC 18C .1526</p>
12.26	<p>WATER SYSTEM OPERATIONS RECORDS Records concerning the operations of water supply, treatment, distribution, and collection. Includes backflow prevention reports, flow reports, capacity studies, pump station reports, and similar records that summarize</p>	<p>Destroy in office after 10 years.</p>	<p>Retention: 40 CFR 141.33 15A NCAC 18C .1526</p>
12.27	<p>WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS FILE</p>	<p>Destroy in office after 5 years.*</p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 13: PROGRAM OPERATIONAL RECORDS – EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS**

Official records documenting the primary functions of emergency services programs and fire departments.

Footage from body-worn cameras is scheduled by the content captured or the purpose of the footage rather than by its format. Recordings may fit under FIRE INVESTIGATION CASE FILES, DISPATCH RECORDS AND RECORDINGS, PUBLICITY RECORDS (General Schedule), TRAINING AND EDUCATIONAL RECORDS (General Schedule), and other items as appropriate. Footage is only confidential if it fits within an item where confidentiality is conferred by state or federal statute.


ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.01 	911 COMMUNICATION RECORDS AND RECORDINGS Records documenting any communications made by the public with 911. Includes transcripts and recordings of 911 calls received, transcripts of text messages received by 911, and computer-aided dispatch (CAD) reports. SEE ALSO: Dispatch Records and Recordings, below AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS)	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.5 G.S. 132-1.4(c)(4) Retention: G.S. 132-1.4(i)
13.02 	AMBULANCE CALL REPORTS (ACR)/PATIENT CARE REPORTS (PCR) Records concerning equipment used, patient location, nature of call, vital signs and other physical signs, care rendered, medicine ordered, etc.	a) Transfer copy of report to the admitting hospital for inclusion into patient's medical record. b) Destroy original in office after 3 years.*	Confidentiality: G.S. 130A-12

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.03	BUILDING AND FIRE SAFETY SYSTEM PLANS Records concerning plans and fire safety systems of commercial, industrial, and government-owned properties.	Destroy in office when superseded or obsolete.	
13.04	 DISPATCH RECORDS AND RECORDINGS Records and recordings concerning activities during an emergency services dispatch. Includes company run reports and fire journals as well as ambulance dispatch and service run records. Also includes footage from body-worn cameras of EMS and Fire Department personnel when responding to an emergency if not otherwise included in a separate item. SEE ALSO: 911 Communication Records and Recordings, above AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS).	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.4 G.S. 143-518 45 CFR 164.501 42 U.S.C. 1395x
13.05	FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE Records documenting licenses and insurance certificates of companies that perform installations of fire alarm and automatic extinguishing systems.	Destroy in office when superseded or obsolete.	
13.06	FIRE DISPATCH FILE Records concerning fire dispatch zones. Includes maps of fire dispatch zones, census tract information, annexation research, street closings, and other related material.	Destroy in office when superseded or obsolete.	


13: EMS & Fire Department

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.07	<p>FIRE INVESTIGATION CASE FILES Records concerning investigations of fire. Includes reports, photographs, evidence, and other related records.</p> <p> SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Case File: Felonies AND Case File: Misdemeanors (STANDARD 20: LAW ENFORCEMENT RECORDS).</p>	<p>a) Retain in office permanently when loss of life occurs or if a publicly-owned building is involved.*</p> <p>b) Destroy in office after 10 years when arson is involved.*</p> <p>c) Destroy in office after 5 years when cause of fire is determined to be accidental and no loss of life occurs.*</p>	Confidentiality: G.S. 132-1.4
13.08	<p>FIRE SAFETY INSPECTIONS AND PERMITS Records documenting inspections of and permits issued for fire protection measures and procedures for systems and buildings.</p>	<p>a) Destroy in office inspections with no defects after 3 years.</p> <p>b) Destroy in office inspections with noted defects 3 years after defects are corrected.*</p> <p>c) Destroy in office permits 3 years after expiration.</p>	
13.09	<p>NORTH CAROLINA FIRE INCIDENT REPORT Includes report required by state statute to document certain fire incidents.</p> <p><i>For retention of copies of fire incident reports filed with other agencies, see: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Reports (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</i></p>	Retain original report permanently.	Authority/Retention: G.S. 58-79-45

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.10 	PHARMACEUTICAL AND NARCOTICS RECORDS Records documenting the administration of pharmaceuticals and narcotics to patients as required by the Drug Enforcement Agency.	Destroy in office after 3 years.*	Authority: 21 CFR 1310.03 Confidentiality: G.S. 130A-12 Retention: 21 CFR 1310.04

13: EMS & Fire Department

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 14: PROGRAM OPERATIONAL RECORDS – PARKS AND RECREATION RECORDS**

Records created and received by Parks and Recreation departments.


ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.01	ADMISSION RECORDS Records of admissions to parks or recreation facilities.	Destroy in office after 3 years.*	
14.02	CITATIONS RECORDS Citations issued by park personnel to persons who violate park rules and regulations.	Destroy in office after 2 years.	
14.03	OFFICIALS FILE Records concerning individuals who officiate games. Includes schedule and correspondence (including e-mail). SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) or Seasonal and Contract Worker Records (STANDARD 4: HUMAN RESOURCES RECORDS) for disposition of payment records.	Destroy in office after 3 years.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.04	<p>PARKS PLANNING FILE Records concerning master plans and working plans for each park property and recreational facility which show layout, topography, and proposed developments and improvements. Includes drainage and resource maps, aerial maps, site analysis drawings, construction plans, and as-built drawings.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS) AND GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Parks (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS (GIS) RECORDS).</p>	<p>a) If an element of the Strategic Plan, destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>Strategic Plan is approved</u></p> <p>b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.</p>	
14.05	<p>POOL RECORDS Records concerning monthly reports indicating operational data, chemicals used, chlorination levels and other information relating to pool construction, maintenance, and health and safety.</p>	Destroy in office after 1 year.	
14.06	<p>RECREATION PROGRAMS Records concerning athletic and recreation programs. Includes staff notes, lesson plans, course descriptions, instruction manuals, schedules, team rosters, reservation records, copies of receipts for fees paid, age verification records, and concession operators list.</p> 	<p>a) Destroy in office program records after 3 years.</p> <p>b) Destroy age verification records when reference value ends.± Agency Policy: Destroy in office after <u>60 Days</u></p>	Confidentiality: G.S. 132-1.12

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.07	TICKET STUBS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>1 Week</u>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 15: PROGRAM OPERATIONAL RECORDS – PLANNING AND REGULATION OF DEVELOPMENT RECORDS**

Official records and materials created and accumulated during the conduct of local government planning, regulation of development, and zoning programs.

Community Development Block Grants (CDBG) records are found in Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.01	BOARD OF ADJUSTMENT CASE FILES AND INDEXES Cases submitted to the board requesting variances from current zoning ordinances. Includes indexes to cases reviewed by the board.	a) Retain indices in office permanently. b) Destroy in office case files after 6 years.*	Retention: G.S. 1-50(5)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.02	<p>CERTIFICATES OF APPROPRIATENESS Certificates submitted by the Historic Preservation Commission allowing alterations to exterior portions of building and structures on or within historic landmarks and districts. Includes applications and other related records.</p>	<p>a) Retain in office certificates for life of structure and then destroy.</p> <p>b) Destroy in office denied applications when reference value ends. ± Agency Policy: Destroy in office after <u>90 Days</u></p> <p>c) Destroy in office remaining records when reference value ends. ± Agency Policy: Destroy in office after <u>90 Days</u></p>	<p>Authority: G.S. 160A-400.9</p>
15.03	<p>COMPREHENSIVE PLAN AND AMENDMENTS Official copies of comprehensive plan and all background surveys, studies, reports, draft versions of plans, and supporting documentation.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office permanently adopted plan and amendments.</p> <p>b) Destroy in office remaining records 3 years after adoption of plan.</p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.04	CONDITIONAL USE PERMIT RECORDS AND INDEX Records concerning applications for conditional use permits. Permits allow for the construction of buildings, on the condition that impacts on neighborhoods are mitigated. Includes original application, blueprint drawings, investigative reports, planning commission recommendations, cash receipts, and related correspondence (including e-mail). Also includes reference copies of variances or exceptions from zoning regulations granted by the Board of Adjustment.	a) Destroy in office 3 years after discontinuance of use. b) Destroy in office applications for which a permit was never issued when reference value ends. ± Agency Policy: Destroy in office after <u>90 Days</u>	
15.05	DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, COMMON AREAS, ETC.	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>filed with appropriate agency</u>	Authority: G.S. 47C-2-103
15.06	ENVIRONMENTAL IMPACT STUDIES Records and reports concerning the environmental impact of major projects proposed by localities and reviewed by local officials.	Retain in office permanently.	
15.07	OPEN SPACE CLASSIFICATION CASE FILE	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.08	PERMITS: TEMPORARY MANUFACTURED HOME Records created to temporarily authorize the location of a manufactured home on the same lot as a single family residence.	Destroy in office 6 years after permit expires.	Retention: G.S. 1-50(5)
15.09	PERMITS: ZONING COMPLIANCE For residential uses, non-residential uses, and accessory structures.	a) Retain in office permits concerning subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office permits concerning subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other permits and related records 6 years after last entry.	Retention: G.S. 1-50(5)
15.10	PETITION & REGULATION RECORDS	Destroy in office after 5 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.11	<p>PLANNING REVIEW CASE FILE For required review of site plan, zoning variance, special permit, change of zoning, subdivision creation or enlargement, municipal or county planning action, or other required review; including, but not limited to, maps, plans, sketches, photographs, engineering reports, environmental impact statement and studies, copies of zoning records, project narrative, correspondence (including e-mail), and record of final determination.</p>	<p>a) Retain plan reviews and related records containing subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently.</p> <p>b) Destroy in office plan reviews and related records containing subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry.</p> <p>c) Destroy in office any other mandatory reviews and related records 6 years after last entry.</p>	Retention: G.S. 1-50(c)
15.12	<p>REZONING RECORDS AND INDEXES Records concerning applications to rezone property within the county or municipality. Includes original applications, review forms, maps of areas involved, copies of investigative reports, copies of relevant planning board minutes, notices of hearings, and development agreements.</p>	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.13	<p>SUBDIVISION RECORDS Includes maps, plats, topographical data, names of streets, records of public utilities, action by council, etc. Also includes preliminary subdivision and group development site plans.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Plats (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS RECORDS).</p>	<p>a) If not filed in Register of Deeds or similar agency, retain in office permanently.</p> <p>b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± <div style="text-align: right;">filed with</div> Agency Policy: Destroy in office after <u>appropriate agency</u></p>	
15.14	<p>VARIANCES Includes zoning variances, watershed variances, and subdivision variances.</p>	Retain official copies permanently in the minutes of the Board of Adjustment or other governing body.	
15.15	<p>VIOLATIONS: ZONING Records concerning notices of zoning violations.</p>	Destroy in office after 6 years.*	Retention: G.S. 1-50(5)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES


STANDARD 16: PROGRAM OPERATIONAL RECORDS – PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS

Official records and materials created and received by public housing authorities, redevelopment commissions, and entitlement communities operated by local government agencies. Where there is a local funding match required to qualify for grant programs, all records should be retained according to the grant requirements listed below.

NOTES: Some records, such as those for Section 8 assistance, are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here. See Bond Closing Records (Budget, Fiscal, and Payroll Records), Grants (Administration and Management Records), and Grants: Financial (Budget, Fiscal, and Payroll Records). 24 CFR Parts 50-58 lay out the environmental review responsibilities of entities but do not establish specific retention requirements, so these records should be handled in accordance with the requirements of the funding source.

ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.01	APPRAISAL PROJECT FILE Evaluations of properties and structures within proposed projects. File includes financial assessments of the worth of real estate and building within proposed project areas. File may also include assessments of architectural and historical significance and condition of the involved structures and real estate.	a) Retain records with historical value permanently. b) Destroy in office remaining records 5 years after completion of abandonment of project.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.02	<p>COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS Records concerning the administration of projects funded under the Community Development Block Grant (CDBG) program, including both direct grants and regrants. Includes applications, reports, audits, certificates, maps, and other related records.</p>	<p>a) Retain records with historical value permanently. b) Destroy in office rejected applications after 1 year. c) Destroy in office remaining records 4 years after execution of the closeout agreement for the grant.</p>	Retention: 24 CFR 570
16.03	<p>COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES Records concerning individual activities under the Community Development Block Grant (CDBG) program for which there are outstanding loan balances, other receivables, or contingent liabilities. Includes reports, audits, and other related records.</p>	<p>a) For recipients, destroy in office 3 years after the receivables or liabilities have been satisfied. b) For subrecipients, destroy in office after such receivables or liabilities have been satisfied.</p>	Retention: 24 CFR 570.502(a)(7)(i)(B)
16.04	<p>COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY Records concerning real property which was acquired or improved in whole or in part using Community Development Block Grant (CDBG) funds. Includes reports, audits, and other related records.</p>	<p>a) For recipients, destroy in office 3 years after these provisions no longer apply to the activity. b) For subrecipients, destroy in office when these provisions no longer apply to the activity.</p>	Authority: 24 CFR 570.503(b)(7) 24 CFR 570.505 Retention: 24 CFR 570.502(a)(7)(i)(B)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.05	CONTINUUM OF CARE RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes required Federal compliance records, program records, financial records, and other related records.	a) Destroy in office records documenting the acquisition, new construction, or rehabilitation of a project site 15 years after the date site is first occupied/used. b) Destroy in office program participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. c) Destroy in office all remaining records after 5 years.	Retention: 24 CFR 578.103(c)
16.06	 CRIMINAL RECORDS CHECKS Records received by the local agency to screen applicants for admission to covered housing programs and for lease enforcement or eviction.	Destroy in office once the purpose for which the record was requested has been accomplished, including expiration of the period for filing a challenge to the PHA action without institution of a challenge or final disposition of any such litigation.	Confidentiality/ Retention: 24 CFR 5.903(g) 24 CFR 5.905(c)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.07	<p>EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes case management records for program participants, required federal compliance records, program records, financial records, and other related records.</p> 	<p>a) Destroy records supporting the expenditure of federal funds passed through NC Department of Health and Human Services (DHHS) on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.</p> <p>b) Destroy in office records documenting renovation of an emergency shelter 10 years after the date that ESG funds are first obligated for the renovation.</p> <p>c) Destroy in office participant records 5 years after the expenditure of all funds from the grant under which the program participant was served.</p> <p>d) Destroy in office all remaining records after 5 years.</p>	<p>Confidentiality: 24 CFR 576.500(x)</p> <p>Retention: 24 CFR 576.500(y)</p>
16.08	<p>FAÇADE PROJECT FILES Records documenting the re-granting of funds received by the agency to restore exteriors of architecturally important structures in project areas. Includes contracts, photographs, and correspondence.</p>	Retain in office permanently.	

16: Public Housing

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.09	<p>HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes records concerning designation as a participating jurisdiction, program records, project records, Community Housing Development Organizations records, financial records, program administration records, records concerning other federal requirements, and other related records.</p>	<p>a) Destroy in office rental assistance records 5 years after termination of assistance.* b) Destroy in office written agreements 5 years after termination.* c) Destroy in office 5 years after the affordability period terminates records of individual tenant income verifications, projects rents and inspections, and documents imposing recapture/resale restrictions. d) Destroy in office records covering displacements and acquisition 5 years after final payment.* e) Destroy in office remaining records after 5 years.*</p>	Authority/Retention: 24 CFR 92.508
16.10	<p>HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes verifications of disability, grant agreements, performance reports, and other related records.</p>	Destroy in office 5 years after the end of the grant term.	Retention: 24 CFR 582.301(c) 24 CFR 583.305(c)

16: Public Housing

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.11	HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes grant agreements, performance reports, and other related records.	Destroy in office after 5 years.	Authority/Retention: 24 CFR 574 24 CFR 5.106(d)
16.12	LANDLORD MONITORING RECORDS Records documenting monitoring of landlords of properties used in affordable or subsidized housing programs. Includes certifications and forms and other compliance-related records.	Destroy in office after 5 years.	
16.13	REDEVELOPMENT PLANS Records concerning redevelopment projects. Includes documentation of the review and certification process.	a) Retain in office permanently records concerning approved redevelopment projects. b) Destroy in office remaining records 2 years after rejection.	

16: Public Housing

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 17: PROGRAM OPERATIONAL RECORDS – PUBLIC TRANSPORTATION SYSTEMS RECORDS**

Records received and created by area transit systems and authorities necessary to meet all statutory requirements.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

Comply with requirements of the Federal Transit Administration's **Best Practice Procurement Manual**, Master Agreement MA(11) Section 8 manual.

ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.01	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS Includes driver's daily assignments, dispatch records, logs of passenger pick-ups and drop-offs, manifests, trip requests, and appeal forms.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.02	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS Vouchers submitted by private transportation companies for reimbursement for alternative transportation of public transit clients.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.03	AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS	Destroy in office after 1 year.	Authority: 2 CFR 200.333

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.04	APPLICATIONS FOR ART-IN-TRANSIT Applications and supporting documentation submitted by regional and national artists for exhibit on agency property.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years after project end</u>	
17.05	APPLICATIONS FOR DISCOUNT PASSES Applications, certificates of disability, and supporting documentation used to apply for discount passes.	Destroy in office 3 years after service is terminated or denied.	
17.06	APPLICATIONS FOR TRANSIT SERVICE Includes customer applications, eligibility assessment records, correspondence (including e-mail), health information, riders' guides, and related records.	Destroy in office 3 years after service is terminated or denied.	
17.07	CUSTOMER (RIDER) IDENTIFICATION RECORDS Records concerning customer identification, approvals, denials, and related information.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
17.08	DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS Includes company's articles of incorporation, financial statements, signed affidavits, letters of reference, declarations, Federal Schedule A or B, and related correspondence (including e-mail).	a) Destroy in office company-specific records 5 years after company is removed from certified list. b) Destroy in office related DBE program records, including Federal Transit Administration reports, 5 years from date record was created.	Authority: 2 CFR 200.333
17.09	OPERATOR SHIFT INSPECTION RECORDS Reports and similar records of operator's inspections of vehicle at the beginning and end of shift.	Destroy in office after 5 years.	Authority: 2 CFR 200.333

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.10	ROUTE HISTORY RECORDS Includes descriptions of routes, bus stops, passenger lists, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
17.11	SEAT BELT AND RESTRAINT SYSTEM RECORDS Records concerning the use and installation of seat belts and other restraint systems in vehicles.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>Retain for the life of the vehicle</u>	
17.12	TRANSIT SCHEDULES Printed route schedules and related information used to generate schedules.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year after route change</u>	
17.13	VANPOOL DRIVER APPLICATIONS Applications and supporting records submitted by persons operating vanpool vehicles.	a) Destroy in office accepted applications 3 years after person leaves program. b) Destroy in office applications for persons not accepted for program after 1 year.	

17: Public Transportation

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 18: PROGRAM OPERATIONAL RECORDS – PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS**

Official records and materials created and accumulated for use by municipal and county sanitation, water, sewage, electrical, and gas operations. Also contains environmental management records accumulated for use by erosion and sediment control, flood control, and monitoring of pollution. Comply with applicable provisions of G.S. §132-1.7 regarding confidentiality of public infrastructure detailed plans and drawings.

ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.01	ENVIRONMENTAL: COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>Strategic Plan is approved</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Authority: G.S. 130A-309.09A
18.02	ENVIRONMENTAL: CUSTOMER USAGE RECORDS Includes reports, plans or similar records submitted by industrial users or publicly-owned treatment works concerning intended or actual use of the wastewater treatment system.	Destroy in office after 3 years.*	Retention: 40 CFR 403.12(o)(3)
18.03	ENVIRONMENTAL: DAILY DISPOSAL TICKETS Record and/or receipts concerning the disposal of materials at the landfill.	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.04	<p>ENVIRONMENTAL: DISCHARGE MONITORING REPORTS Includes discharge and non-discharge monitoring reports submitted to state and/or federal regulatory agencies. Also includes copies of monthly reports required by National Pollution Discharge Elimination System (NPDES) permits.</p>	<p>a) Destroy in office NPDES reports 5 years from date of submission.*</p> <p>b) Destroy in office annual reports 5 years from date of submission.*</p> <p>c) Destroy in office daily reports after 3 years.</p>	<p>Retention: 40 CFR 122.41(3)(j)(2) 15A NCAC 2B .0506</p>
18.05	<p>ENVIRONMENTAL: LANDFILL MONITORING REPORTS Gas and groundwater monitoring records and reports.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain official reports permanently.</p> <p>b) Destroy in office remaining records after 3 years.</p>	<p>Retention: 15A NCAC 13B .1626(10)</p>
18.06	<p>ENVIRONMENTAL: LANDFILL OPERATIONAL PLAN Describes the intended schedule of construction, description of on-site waste handling procedures during active life of the facility, contingency plans, description of maintenance of installed equipment, and any other information pertaining to the operation, maintenance, monitoring, or inspections as may be required by federal and state law.</p>	<p>Destroy when superseded or obsolete.*</p>	<p>Authority: G.S. 130A-309.09D</p>

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.07	ENVIRONMENTAL: LANDFILL PERMITS Permits and related records of landfills owned or operated by agency. Includes amendments and hazardous waste management permits.	a) Retain construction and operation permit for life of system and then destroy. b) Destroy in office all other permits and related records after the 5-year reporting period is complete.	Retention: G.S. 130A-294 (b1) (4)
18.08	ENVIRONMENTAL: NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE Notices issued by agency concerning improper non-stormwater discharge or disposal. Includes improper disposal of waste or products, chlorinated pool discharge, vehicle maintenance facility runoff, food service waste, and other unregulated commercial and industrial discharges.	Destroy in office one year after resolution.	
18.09	ENVIRONMENTAL: OUTSIDE WASTE CLEARANCE RECORDS Records allowing parties outside the operator's jurisdiction to dispose of waste at landfill.	Destroy in office 3 years after expiration of agreement.	
18.10	ENVIRONMENTAL: REPORTS SUBMITTED TO U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA)	Destroy in office after 2 years.*	
18.11	EROSION CONTROL: EROSION AND SEDIMENT AFFIDAVITS Forestry and agricultural affidavits clarifying land use exempt from land-disturbing activity standards.	Destroy in office after 6 years.	

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.12	EROSION CONTROL: EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>3</u> years	
18.13	EROSION CONTROL: EROSION AND SEDIMENT CONTROL INSPECTIONS Inspections conducted by agency. Includes inspection requests, notices of violations, denial reports, sketches, plans, correspondence (including e-mail), and similar records concerning the construction, modification or demolition of existing and new roads and construction sites.	Destroy in office 6 years after final site inspection.*	
18.14	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PERMITS Records concerning permits, including permit logs, issued for site construction.	a) Destroy in office records concerning approved permits 3 years after expiration of permit. b) Destroy in office non-approved permits after 3 years.	
18.15	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans submitted to agency. Includes revisions, addendums, and records delineating who is financially responsible for the project.	a) Destroy approved plans in office 3 years after expiration. b) Destroy non-approved plans after 3 years.	Authority: 15A NCAC 04B .0118

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES





ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.16	<p>EROSION CONTROL: TROUT BUFFER VARIANCES Includes denials and waivers.</p> <p>SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Variances (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).</p>	<p>a) Destroy in office 6 years after approval of permit.</p> <p>b) Destroy in office after 3 years plans for which a permit was not issued.</p>	<p>Authority: 15A NCAC 04B .0125</p>
18.17	<p>FLOOD CONTROL: FLOOD CERTIFICATIONS Records concerning lot reviews for construction projects submitted to agency.</p> <p>SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Permits: Zoning Compliance (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).</p>	<p>Destroy in office when superseded or obsolete.</p>	
18.18	<p>FLOOD CONTROL: FLOOD STUDIES Reviews of stream crossings for construction projects submitted to agency.</p>	<p>Retain in office for life of structure and then destroy.*</p>	
18.19	<p>UTILITIES: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS Records concerning water distribution and treatment.</p>	<p>a) Destroy in office records concerning the operation of wastewater treatment facilities after 5 years.*</p> <p>b) Destroy in office records concerning the operation of water treatment facilities after 3 years.*</p>	<p>Authority: 15A NCAC 18C .1301</p>

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.20 	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS Includes authorizations to construct, building plans, and specifications of privately owned utilities.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>Strategic Plan is approved</u></p> <p>b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.</p>	Confidentiality: G.S. 132-1.7
18.21	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute and issued by agency.</p>	<p>a) Destroy in office permits 5 years after expiration, cancellation, revocation or denial.*</p> <p>b) Retain approval letters and supporting documentation permanently.</p>	
18.22	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS Records documenting installation, location, specifications, and maintenance history of meters, lines, pipes, pumps, and similar system equipment.</p>	Destroy in office 3 years after equipment is no longer owned and/or operational.	
18.23 	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Retain in office for life of system and then destroy.	Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.24	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS	a) Retain project pre-approval and final approval letters for life of system and then destroy. b) Destroy in office remaining records 5 years after project is completed.	
18.25	UTILITIES: LANDLORD AGREEMENTS Agreements to automatically transfer utility accounts to landlords when their tenant vacates a property.	Destroy in office 3 years after expiration of agreement.	
18.26	 UTILITIES: MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS) Includes maps, plats, charts, and similar records showing the location of water mains, valves, hydrants, meters, etc., throughout the system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps, All Other (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS).	Retain for life of system and then destroy.	Authority: 15A NCAC 18C .0300 Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.27	UTILITIES: METER INSTALLATION, TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS) Includes records concerning the installation or planned installation of meters and connecting any facility to utility system owned or operated by the agency.	a) Destroy in office records verifying installation of meter 3 years after equipment is no longer owned and/or operational. b) Destroy in office notice to property owners of approval of utility installation after 2 years. c) Destroy in office remaining records after reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
18.28	UTILITIES: PUBLIC UTILITIES INSPECTION FORMS Records relating to the inspection of sanitation, electric, water, gas and sewer utilities submitted to or conducted by agency.	Destroy in office when superseded or obsolete.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.29 	UTILITIES: PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS Includes records documenting installation, authorizations to construct, building plans, location, specifications, and maintenance history, for hydrants, pipes, pumps, valves, and similar system equipment. Includes drainage system maintenance and repair records.	a) Retain in office as built plans and specifications for life of system and then destroy. b) Destroy in office 5 years after equipment is no longer owned and/or operational if unlike replacement occurred. c) Destroy in office 3 years after equipment is no longer owned and/or operational if like replacement occurred. d) Destroy in office background surveys, studies, reports, drafts, and other records when superseded or obsolete.	Authority: 15A NCAC 18C .0300 15A NCAC 2H .0115 Confidentiality: G.S. 132-1.7
18.30	UTILITIES: RECYCLING WATER RECORDS Backwash recycling groundwater records.	Destroy in office when superseded or obsolete.	Authority: 40 CFR 141.76(d)
18.31	UTILITIES: SERVICE INTERRUPTION RECORDS Includes reports, logs, or similar records documenting service interruptions.	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.32	UTILITIES: TAP AND HOOK UP RECORDS Applications, permits, contracts, logs, or similar records documenting location and installation of water and wastewater hookup and taps.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office denied applications and remaining records when reference value ends. ± Agency Policy: Destroy in office after _____ 90 days	Confidentiality: G.S. 132-1.1(c)
18.33	UTILITIES: WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute for systems owned or operated by agency. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain approval letters and supporting documentation permanently. b) Destroy in office permits and other records 5 years after expiration, cancellation, revocation or denial.*	Retention: 15A NCAC 18C .0300 15A NCAC 2H .0115 40 CFR 122.28
18.34	UTILITIES: WASTEWATER MAINTENANCE OPERATION REPORTS	Destroy in office after 3 years.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.35	<p>WATER QUALITY: LABORATORY OPERATIONS RECORDS Includes documentation of all analytical quality control practices, reporting units, forms, test methods, and related procedures pertaining to certification obtained by agency.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy in office samples, raw data, analysis reports and related documentation after 5 years.*</p> <p>b) Destroy in office records concerning certification 2 years after expiration, cancellation, revocation, or denial.*</p>	<p>Authority: 15A NCAC 02H .0805(7)(G) 15A NCAC 02H .1100</p>
18.36	<p>WATER QUALITY: PRETREATMENT PROGRAM RECORDS Includes annual pretreatment reports, records of monitoring activities and results, water quality records and other related documentation.</p>	<p>a) Destroy in office permits and supporting documentation 5 years after expiration, cancellation, revocation, or denial.*</p> <p>b) Destroy in office remaining records after 3 years.*</p>	<p>Retention: 15A NCAC 02H .0908(f)(1) 40 CFR 503.17</p>
18.37	<p>WATER QUALITY: PUBLIC WATER SANITARY SURVEY RECORDS Includes reports, summaries, studies, correspondence (including e-mail), and other related records documenting the sanitary condition of system.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy in office 10 years after completion of survey.*</p> <p>b) Destroy in office documentation of corrective measures 2 years after their implementation.</p>	<p>Retention: 40 CFR 141.33 15A NCAC 18C .1526</p>

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.38	WATER QUALITY: SEWER JETTING AND VECTORING RECORDS Records documenting the routine cleaning of wastewater lines.	Destroy in office after 3 years.	
18.39	WATER QUALITY: SLUDGE TREATMENT RECORDS Includes analyses, certification statements, site restrictions, monitoring records, vector attraction reduction requirements, trip tickets, residual records, control plans and other related documentation conducted by or for agency.	Destroy in office after 5 years.*	Retention: 40 CFR 503.17
18.40	WATER QUALITY: STORMWATER DEVIATION PERMITS Permits issued to single lots. Includes applications, certifications of installations, and related records.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office inspections submitted by owner when superseded or obsolete.	
18.41	WATER QUALITY: VIOLATION RECORDS Includes all documentation of actions taken to correct federal, state or local violations of water and wastewater management standards by agency.	Destroy in office after 5 years.*	Retention: 40 CFR 141.33 15A NCAC 18C .1526
18.42	WATER QUALITY: WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS Includes non-compliance inspections and test records conducted by a facility.	Destroy in office after 5 years.	

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 19: PROGRAM OPERATIONAL RECORDS – STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS**

Official records and materials created and accumulated for constructing and maintaining municipal and county-maintained streets and other public works projects, and engineering records.


ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.01	<p>APPRAISAL REPORTS Records appraising privately owned land for compensation in eminent domain projects.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).</p>	Destroy in office after 10 years.	
19.02	<p>CEMETERY DEEDS Copies of deeds for the purchase of agency-owned cemetery plots. Includes applications or deed slips.</p>	<p>a) Retain 1 copy of deed in office permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 year</u></p>	
19.03	<p>CEMETERY INTERMENT RECORDS Includes name of deceased, date of interment, and location of plot.</p>	<p>Retain in office permanently.</p> <p><i>Retention Note: If these records are maintained as an electronic database, a copy should be maintained on paper or microfilm and updated regularly.</i></p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.04	EXCAVATION PERMITS Applications, permits, and billing information for individuals and contractors requesting to work in the county or municipal right-of-way for demolitions or excavations.	a) Destroy in office billing records after 3 years.* b) Destroy in office applications and permits 1 year after expiration. c) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>90 days after denial</u>	
19.05	GRAVE OPENING ORDERS Authorizations to dig graves in agency-owned cemeteries.	Destroy in office after 1 year.	
19.06	INFRASTRUCTURE MAINTENANCE RECORDS Records documenting the general maintenance and upkeep of infrastructure, including roads, traffic lights, and other public works.	Destroy in office after 3 years.	
19.07	PLANNING FILE Includes long-range and immediate plans for paving streets and other projects.	Destroy in office 5 years after superseded or obsolete.	
19.08	 PROJECT RECORDS - CANCELLED Background information for public works and engineering projects explored but not undertaken. Records are used as a reference file and include maps, project information, and the reason that the project failed.	a) Retain records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>90 days after cancellation</u>	Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.09 	<p>PROJECT RECORDS – CORE Records used to document the design and construction of public works and engineering projects. Includes final as-built plans and specifications; certificate of completion/closure; policy correspondence (including e-mail), covenants; final estimates and budgetary summaries; geo-technical reports; environmental mitigation agreements; permits for right-of-way use, photographs documenting key aspects of construction as-built; final specifications; and as-built structural calculations.</p>	Destroy originals after life of structure ends.	Confidentiality: G.S. 132-1.7


19: Streets, Public Works, and Engineering

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.10	<p> PROJECT RECORDS – ENGINEERING & COMPLIANCE Records used to document the engineering and technical areas of a public works and engineering project, as well as compliance with regulatory requirements. Includes superseded plans and specifications, agreements for construction and finance, billing information, change orders, force orders, work orders, construction claims, contract documentation, contracts, reports, diaries and narratives, EEO information, material certifications, material testing reports, notice to proceed, permit of entry, postings, pre-construction conference records, final progress payments, punch lists, regulations, shop drawings, and subcontractor information. File also includes environmental review records and proof of compliance with any mitigation measures required as a condition of project authorization.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.)</p>	Destroy in office 6 years after completion or termination of project.*	Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.11	PROJECT SHEETS FILE Local forms listing property owners, lot or tract size, right-of-way data, tax value, and compensation.	Destroy in office after 5 years.	
19.12	RIGHT-OF-WAY ACQUISITION WORKING RECORDS Includes records of negotiations on acquisition of rights-of-way related to public works and engineering projects, such as 10-day letter of notification, notification of intent to acquire, notice of condemnation action, and other correspondence (including e-mail) relating to right-of-way acquisitions. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 3 years.*	
19.13	STREET NAME AND HOUSE NUMBER FILES Records relating to the assignment of street names and house numbers. May also include records documenting street name changes, and non-temporary street openings and closings.	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.14 	<p>STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS Records used for maintenance, review, and analysis of permanent and temporary structures owned by third parties that extend, cross or abut the public right-of-way.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy records pertaining to structure 3 years after the end of life of the structure.	Confidentiality: G.S. 132-1.7
19.15	<p>SURVEY FIELD RECORDS Records used to document and establish easements and rights-of-way, and to locate reference points used during street and utility projects. Records include traverse information, tie sheets, sketches, field notes, plats, interpretation of field notes, alignments, profiles of projects, plans, grade sheets, estimates, databank ties, and other miscellaneous documents used to establish grades, rights-of-way and easements.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).</p>	<p>a) Retain records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
19.16	<p>TRAFFIC ANALYSIS Analysis of vehicle traffic within agency jurisdiction.</p>	Destroy in office after 5 years.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.17	TRAFFIC VIDEO RECORDINGS AND DATA Recordings and other data used to monitor traffic levels.	Destroy in office after 30 days.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

STANDARD 20: PROGRAM OPERATIONAL RECORDS - LAW ENFORCEMENT RECORDS (EXCLUDING SHERIFF'S OFFICES)

Records received and created by any local government law enforcement agency (excluding sheriff's offices) necessary to meet all statutory requirements. Comply with applicable provisions of G.S. §132-1.4 regarding confidentiality of law enforcement records and G.S. §153A-98 and G.S. §160A-168 regarding confidentiality of personal information of law enforcement officers.



Please note: Records created by county sheriff's offices fall under the purview of the Records Retention Schedule of County Sheriff's Offices.

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.01	ALARM CALL REPORTS Reports completed by officers responding to alarm calls. Includes listings of alarm type, time received, time arrived, reason for activation, and other related information. Includes forms completed by businesses and residences naming emergency contacts, location of safe, or other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	
20.02	ALTERNATIVE SENTENCING PROGRAMS Records documenting alternative sentencing programs. Includes work release and weekender service.	Destroy in office 3 years after individual leaves program.	
20.03	 ARREST PROCESSING RECORDS Records used to track a defendant's time and activities while in arrest processing. Includes time of arrival and time to and from each workstation.	Destroy in office 1 year after date of arrest.*	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.04 	ARREST REPORTS Reports concerning arrests made by officers.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 5 years from date of arrest if report is not made part of a case file.	Confidentiality: G.S. 132-1.4
20.05	AUCTION RECORDS Records concerning abandoned and unclaimed articles or found property in possession of law enforcement sold at public auction. May include auction receipts of monies received for items sold.	Destroy in office after 3 years.*	
20.06 	CASE FILE: FELONIES Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure report, statements of seized and returned property, interview sheets; case status reports, photographs, court orders, correspondence; officer's notes, court dispositions, audio or video recordings, and other related records. SEE ALSO: Electronic Recordings of Interrogations, below.	a) Destroy in office records concerning solved cases 20 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved cases until solved, and then follow disposition instructions in part (a).	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.07 	<p>CASE FILE: MISDEMEANORS Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure reports, statements of seized and returned property, interview sheets, case status reports, photographs, court orders, correspondence, officer's notes, court dispositions, audio or video recordings, and other related records.</p>	<p>a) Destroy in office records concerning solved malicious misdemeanor cases 3 years after disposition of case and exhaustion of any appeals.*</p> <p>b) Retain in office records concerning unsolved malicious misdemeanor cases until solved, and then follow disposition instructions in part (a).</p> <p>c) Destroy in office records concerning all misdemeanor cases not covered in (a) or (b) after 3 years.*</p>	Confidentiality: G.S. 132-1.4
20.08 	<p>COMMUNICATION RECORDS Recordings, printouts, and logs of telephone, radio, dispatch, 911 emergency calls or texts, and computer aided dispatch (CAD) systems incoming and/or outgoing communications. Includes time and date of call, contents of call, location of call, name of unit sent to scene, and other related information.</p> <p>SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, 911 Communication Records and Recordings AND Dispatch Records and Recordings.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 30 days if not made part of a case file.</p>	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.09 	COMPLAINTS Records concerning complaints to which a unit responded. Includes logs listing name and address of victim, time, date, nature of complaint, responding officer's name, action taken, and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 3 years after resolution if not made part of a case file.	Confidentiality: G.S. 132-1.1(a)
20.10	COMPOSITE INTERVIEWS Summaries of interviews used to determine the physical description of suspects.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	
20.11 	CRIME ANALYSIS RECORDS Records used to anticipate, prevent, or monitor possible criminal activity. Includes crime reports, photographs, complaints, copies of citations, criminal profile information, and interoffice memoranda generated or accumulated in connection with investigations or directed patrols.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: G.S. 132-1.4 G.S. 132-1.7(a2) Authority/ Confidentiality/ Retention 28 CFR 23.20

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.12 	<p>DETENTION FACILITY INCIDENT REPORTS Detention facility incident reports. Include narratives of incidents, lists of those involved, statements and interview reports, inmates' refusal of medical treatment, inmates' refusal to press charges, and other related records.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Litigation Case Records (STANDARD 6: LEGAL RECORDS).</p>	<p>c) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>d) Destroy in office after 3 years if not made part of a case file.*</p>	Confidentiality: G.S. 132-1.1(a)
20.13	<p>DETENTION FACILITY OPERATIONAL RECORDS Records concerning all activities occurring during shifts at detention facilities. Includes end of duty (shift change reports, key and radio control lists, equipment and inmate/non-inmate housing check lists, cell inspection reports, laundry exchange and controlled property lists, tour reports, etc.) and inmate accountability (rosters, commitment and release reports, cell locations, etc.) records.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u></p>	
20.14	<p>DETENTION FACILITY PHYSICAL FORCE RECORDS Reports made by any officer or employee of a detention facility who applies physical force to an inmate or arrestee.</p>	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.15	<p>DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES</p> <p>Records and logs listing entries and inquiries made against DCI-NCIC networks and concerning missing persons, wanted persons, stolen vehicles or other property, and other related topics.</p>	Destroy in office 1 year after period covered by audit.*	Authority: 28 USC 534
20.16	<p>DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS</p> <p>Requests and proofs of verification for DCI-NCIC or other law enforcement information networks.</p>	Destroy in office after 1 year.*	Authority: 28 USC 534
20.17	<p>DNA SAMPLING RECORDS</p> <p>Records documenting the collection of DNA samples from persons for qualifying offenses. Includes copies of judgments. Original samples are forwarded to the State Crime Lab.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office 1 year from date sample was obtained if not made part of a case file.</p>	Authority: G.S. 15A-266.8

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.18 	DOMESTIC VIOLENCE RECORDS Restraining orders and related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after expiration of restraining order if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.19	DRUG AND ALCOHOL TESTING RECORDS Records and reports generated when individuals suspected of being under the influence of or impaired by illegal drugs or alcohol are chemically tested. Includes reports used for persons arrested for driving while impaired by alcohol and/or drugs and breathalyzer analysis reports. SEE ALSO: Laboratory Case Records, below.	a) Transfer original Driving While Impaired (DWI) reports to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.20 	ELECTRONIC RECORDINGS OF INTERROGATIONS Electronic recordings generated by audio and/or video recording devices of custodial interrogations in an investigation of a juvenile or any person in a criminal investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 Days</u>	Authority: G.S. 15A-211 Confidentiality: G.S. 7B-3001(b) G.S. 132-1.4A
20.21 	FIELD OBSERVATIONS Records concerning field observations of suspicious persons or vehicles. Includes subject's name, address, and physical description; date, time, and location of occurrence; reason for stop; name of officer conducting interview; and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.22	<p> FINGERPRINT CARDS Records used to verify a subject's identity. Includes fingerprints and all necessary information required to identify an individual. Also includes records of latent finger and palm prints that were found at the scene of a crime without identification of suspects</p> <p><i>Original fingerprint records are forwarded to the State Bureau of Investigation.</i></p> <p>SEE ALSO: Juvenile Case History Identification Records, below.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 3 years if not made part of case file.</p>	<p>Confidentiality: G.S. 132-1.4</p> <p>Authority: G.S. 15A-502</p>
20.23	<p>FORCIBLE ENTRY RECORDS Records concerning forcible entries made by law enforcement personnel.</p>	Destroy in office after 1 year.	
20.24	<p>FUGITIVE WARRANTS CASE RECORDS Records concerning fugitive warrants sent to a department from another jurisdiction requesting assistance in finding an individual. Includes fugitive profile and warrant.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after _____ 30 days _____</p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.25 	<p>IDENTIFICATION PHOTOGRAPHS Photographs (mugshots) of persons arrested in association with formal investigations. Also includes driver's license photos or negatives.</p> <p>SEE ALSO: Juvenile Case History Identification Records, below.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 3 years if not made part of a case file.</p>	Confidentiality: G.S. 132-1.4
20.26	<p>INCIDENT RESPONSE REPORTS Reports completed by officers responding to incidents. Includes victim, suspect, and witness information; damaged and stolen property reports; statement sheets; Miranda waiver forms; and other related records.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office when reference value ends if not made part of case file.±</p> <p>Agency Policy: Destroy in office after <u>30 days</u></p>	Confidentiality: G.S. 132-1.4
20.27	<p>INMATE CLASSIFICATION RECORDS Records concerning classification information gathered by the detention facility while inmates are incarcerated. Also includes incident reports, behavioral or disciplinary reports, interviews, classification level assigned, requested housing moves, and other related records.</p>	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.28	INMATE COMMITMENT RECORDS Copies of judgment and commitment papers received from the Clerk of Superior Court's office used to validate time spent incarcerated.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	
20.29	INMATE DEATH REPORTS Reports filed by office upon the death of an inmate. A report must be sent to the county health director and N.C. Department of Health and Human Services, within five days of the death.	Destroy in office after 3 years.*	Authority: G.S. 153A-224(b)
20.30	INMATE FINANCIAL RECORDS Records concerning individual inmate funds maintained by a detention facility for use by the inmate while incarcerated. Includes balance sheets listing inmate's name and number, amount of funds, dates of deposits and withdrawals, and other related information.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.31 	INMATE GRIEVANCE RECORDS Records concerning grievances filed by inmates and actions taken.	a) If legal action is taken and case adjudicated, destroy in office 5 years after final disposition. b) If legal action is taken and case non-adjudicated (out-of-court claims), destroy in office 5 years after final disposition or expiration of relevant statute of limitations. c) Destroy remaining records in office 3 years after inmate is released or transferred from the facility.*	Confidentiality: G.S. 132-1.1(a)
20.32	INMATE MAIL, TELEPHONE, OR VISITOR RECORDS Records concerning telephone calls and mail sent and received by inmates and individuals visiting inmates confined in county or municipal detention facilities. Includes logs listing inmate's name, date and time of call or mail, visitor's signature and address, and other related information.	Destroy in office after 1 year.*	
20.33	INMATE MEAL RECORDS Records concerning the planning and scheduling of inmate meals. Includes food service daily shift reports, daily meal sheets, food order forms, kitchen checklists, lists of inmates receiving meals and other related records. File also includes records concerning requests for special diets made by inmates.	Destroy in office after 3 years.*	Retention: 10A NCAC 14J .1723

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.34	 <p>INMATE MEDICAL RECORDS Records concerning medical examinations, diagnoses, and treatments of inmates. Includes medical information sheets and screening forms, medical histories as provided by inmate, receipt and/or release forms for medications and medical articles, laboratory and x-ray reports, blood pressure records, sick bay transfer forms, special diet authorizations, psychological evaluation forms, suicide watch sheets, progress notes, health assessment forms, dental forms, doctors' orders, transportation records to outside clinics or hospitals, and other related records. May also include authorization records for release of medical information to detention facility staff, informed consent forms, refusal of treatment forms, and release of financial responsibility forms.</p> <p>SEE ALSO: Juvenile Detention Records, below.</p>	Destroy in office 10 years after inmate's release or parole.	Confidentiality: G.S. 8-53 45 CFR 164.502
20.35	<p>INMATE PERSONAL IDENTIFICATION RECORDS Records concerning changes to be made to an inmate's incarceration file. Includes personal identification changes, superior court calendar, long form dismissals and other related records.</p>	Destroy in office 30 days after receipt.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.36	INMATE RESEARCH REQUESTS Requests filed by inmates seeking use of a facility's law library or similar collection containing research materials.	Destroy in office 1 year from date of request.	
20.37 	JUVENILE CASE FILES Includes incident and arrest reports, detention orders, disposition instructions, name and address of person having legal and/or physical custody of child, correspondence with county, municipal, or state juvenile services, and other related records.	a) Destroy in office records when juvenile reaches 21 years of age if adjudicated for an offense that would have been a Class A, B1, B2, C, D, or E felony if committed by an adult. b) Destroy in office records related to all other cases when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b) Retention:
20.38 	JUVENILE CASE HISTORY IDENTIFICATION RECORDS Includes fingerprints and photographs.	a) Transfer to the State Bureau of Investigation and Federal Bureau of Investigation. b) Destroy in office agency copies when reference value ends.*± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality/ Retention: G.S. 7B-2102
20.39 	JUVENILE DETENTION RECORDS Records concerning medical and non-medical information gathered on juvenile inmates held in county or municipal detention facilities.	a) Destroy in office medical records when juvenile reaches 30 years of age. b) Destroy in office non-medical records when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.40 	LABORATORY CASE RECORDS Records concerning cases examined in a crime laboratory; includes reports, notes, charts, and other related records	Retain in office permanently.	Confidentiality: G.S. 132-1.4
20.41 	LAW ENFORCEMENT AUDIO AND VIDEO RECORDINGS Tapes and digital recordings generated by mobile and fixed audio and video recording devices. Does not include Electronic Recordings of Interrogations, above.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4A G.S. 153A-98
20.42	MULTIPLE FIREARMS SALES REPORTS Reports received from dealers reporting the sale of multiple firearms.	Destroy in office when reference value ends, but within 20 days after receipt.± Agency Policy: Destroy in office after <u>30 days</u>	Retention: 18 USC 923(g)(3)(b)
20.43	MULTIPLE FIREARMS SALES REPORTS DESTRUCTION RECORDS Records submitted after 6 months to the U.S. Attorney General's Office certifying that all multiple firearm sales reports received from dealers have been destroyed.	Destroy in office after 1 year.	Authority: 18 USC 923(g)(3)(b)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.44	ORDINANCE VIOLATIONS CITATIONS Citations issued for violations of municipal and county ordinances.	Destroy in office after 3 years.*	
20.45	PAWNSHOP RECORDS Pawnshop cards and property records submitted to municipal and county law enforcement offices.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	Authority: G.S. 66-391
20.46	PERMISSION TO SEARCH RECORDS Authorizations for officers to search property, and if necessary, confiscate property deemed pertinent to an investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of a case file.± Agency Policy: Destroy in office after <u>30 days</u>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.47 	PERMITS: CONCEALED WEAPONS AND HANDGUNS Applications and supporting documentation filed to carry concealed weapons or purchase handguns. Includes background checks and other related records.	<ul style="list-style-type: none"> a) Destroy in office all approved applications after 5 years. b) Destroy in office denied applications and related records 5 years from date of denial or resolution of petition filed with district court, whichever is longer. c) Destroy in office background checks and related records concerning approved applications when permit is issued. 	Authority/ Confidentiality: G.S. 14-415.17 G.S. 132-1.4 G.S. 132-1.7
20.48	PRISON RAPE ELIMINATION ACT (PREA) FILE Allegation, investigation, and incident review records documenting investigations into allegations of sexual abuse or sexual harassment.	Destroy in office 6 years after inmate's release.* <i>Retention Note: If a minor is involved in the incident, records should be retained until the minor reaches age 30.</i>	Authority: 28 CFR Part 115
20.49	PRISON RAPE ELIMINATION ACT (PREA) DATA FILE Aggregated data for every allegation of sexual abuse at county or municipal lockups.	Destroy in office after 10 years.	Authority/Retention: 28 CFR Part 115.187 28 CFR 115.189(d)
20.50	PRISONER TRANSPORT RECORD Verification forms completed by receiving party of prisoner patient.	Destroy in office after 1 year.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.51	PROPERTY RECORDS Records concerning confiscated property, evidence, stolen or recovered property, and unclaimed property. Includes descriptions of property and its value, serial numbers, and other related records. Records may also be filed with original incident report.	Destroy in office 3 years after final disposition of property.	
20.52	PURSUIT LOGS Logs concerning pursuits by law enforcement personnel.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	
20.53	RIDE-ALONG PROGRAM RECORDS Records concerning a law enforcement ride-along program.	Destroy in office after 3 years.*	
20.54	SEXUAL OFFENDER RECORDS Records concerning sexual offenders living within jurisdiction.	a) Destroy in office records of persons registered in the "Sexually Violent Predator Program" when individual is known dead or after 90 years. b) Destroy in office records of persons registered in the "Sex Offender and Public Protection Program" after court petition and review by the state; or after 30 years or length of court order, whichever is greater; or when individual is known dead.	Authority: G.S. 14-208 Retention: G.S. 14-208.6A

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.55	TRAFFIC ACCIDENT REPORTS Records concerning traffic accidents. Includes general correspondence, property receipts, collision reports, waivers signed by involved parties agreeing to settle damages among themselves, and other related records.	a) Transfer original collision report to the N.C. Division of Motor Vehicles within 10 days of accident. b) Destroy in office after 3 years records concerning accidents not meeting N.C. Division of Motor Vehicles reporting requirements, but for which a report was made. c) Destroy in office duplicate reports when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: 18 USC 2721
20.56	 TRAFFIC CITATIONS AND WARNINGS Citations issued to drivers violating motor vehicle and traffic laws. Includes voided citations and warnings that do not require a fine or court appearance.	a) Transfer original citations to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy remaining records in office after 1 year.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.57	<p>TRESPASS RECORDS Authorizations by property owners, lessees, or managers for law enforcement officers to take action deemed appropriate to remove unauthorized persons and issue trespass warnings.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office 1 year after expiration if not made part of a case file.</p>	<p>Authority: G.S. 14-159.12-13</p>
20.58	<p>VEHICLE TOWING RECORDS Includes recovery authorizations and consent forms completed by owners to have vehicle towed, removed, stored, or left at the scene.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 1 year if not made part of a case file.</p>	



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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

STANDARD 21: PROGRAM OPERATIONAL RECORDS - TAX RECORDS (FOR MUNICIPALITIES)

Records received and created by a municipality for the purposes of collecting taxes. For County Tax Administration records, please refer to the separate County Tax Administration Program Schedule.

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.01 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals by the municipality. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Authority: G.S. 160A-212 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.02	BEER AND WINE TAXES AND RECORDS Records concerning the levy of privilege taxes on beer and wine.	Destroy in office after 3 years.*	Authority: G.S. 105-133.77-79
21.03 	BICYCLE LICENSE PLATE RECORDS Records concerning issuance of license plates for bicycles.	Destroy in office after 1 year.*	Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.04	<p>DELINQUENT TAXPAYER RECORDS Records concerning taxpayers who have not paid real and personal property taxes due, including unpaid notices.</p> <p>SEE ALSO: Delinquent Taxpayer Records: Advertisement of Tax Liens Against Real Property, below.</p>	Destroy in office after 10 years or 3 years after final settlement or 1 year after released by governing board, whichever comes first.*	
21.05	<p>DELINQUENT TAXPAYER RECORDS: ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY Records concerning the municipal taxation officer's publication in the newspaper of delinquent taxpayer and tax sales notices.</p> <p>SEE ALSO: Delinquent Taxpayer Records, above.</p>	Destroy in office after 10 years.*	Authority: G.S. 105-369
21.06	<p>MOTOR VEHICLE RENTAL TAX RECORDS Records concerning motor vehicle rental tax assessments.</p>	Destroy in office after 3 years.*	
21.07	<p>MUNICIPAL VEHICLE TAX RECORDS Records concerning municipal vehicle taxes levied annually.</p>	Destroy in office after 3 years.*	Authority: G.S. 20-97(b)
21.08	<p>PREPARED FOOD AND BEVERAGE TAX RECORDS Records concerning prepared food and beverage tax assessments.</p>	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.09	<p>PRIVILEGE LICENSES, TAXES, AND FEE RECORDS Records concerning the licensing of occupations, businesses, trades, professions, and forms of amusement or entertainment and associated fees and taxes.</p> <p>SEE ALSO: Animal Licensing Records (above), Beer and Wine Taxes and Records (above), Municipal Vehicle Tax Records (above), Taxicab and Limousine Tax Records (below).</p>	Destroy in office after 3 years.*	Authority: G.S. 160A-194
21.10	<p>ROOM OCCUPANCY TAX RECORDS Records concerning the administration of room occupancy tax records for those municipalities who have adopted room occupancy taxes.</p> 	Destroy in office after 3 years.*	Authority: G.S. 160A-215 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.11	 <p>SCHEDULE "B" LICENSES Receipts of licenses issued by municipality in accordance with Article 2, Schedule B of the Revenue Laws of North Carolina. Applies to privilege licenses issued to attorneys-at-law and other professionals, installment paper dealers, and pawnbrokers.</p>	<p>a) Destroy in office 3 years after close of license tax year stubs or detailed settlement records.</p> <p>b) Destroy in office stubs 1 years after audit if settlement records are kept.</p>	<p>Authority: G.S. 105-41 G.S. 105-83 G.S. 105-88 G.S. 153A-152 G.S. 160A-211</p> <p>Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1</p>
21.12	<p>TAX ABSTRACTS AND LISTS Records concerning real and personal property in the municipality, based on assessment lists. Includes name and address of taxpayer along with descriptions of property owned and estimated value.</p>	Destroy in office after 10 years or two revaluation cycles.	<p>Authority: G.S. 105-309 G.S. 105-296</p>
21.13	<p>TAX EXEMPT PROPERTY FILE Records concerning property that is exempt from taxation.</p>	Destroy in office 5 years after property exemption has expired or at end of life of structure, whichever comes first.	
21.14	<p>TAX LEDGER CARDS OR SHEETS</p>	Destroy in office 5 years after superseded or obsolete.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.15	TAX LEVY/SEIZURE RECORDS Inventory of property taken from property owner by the municipal tax collector to pay back taxes.	a) Destroy in office after 3 years execution forms if levy and sale of personal property is made. If levy and sale are conducted by municipal law enforcement agency, execution forms are to be retained by that agency. b) If levy, seizure, and sale are not made, destroy in office forms when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	Authority: G.S. 105-366 G.S. 105-367
21.16	TAX LIEN SALES Records concerning sales held to satisfy tax liens.	Destroy in office 10 years after sale.	
21.17	TAX REBATES Records concerning tax rebates given or received.	Destroy in office after 10 years.	
21.18	TAX SCROLLS Records indicating property (real estate and personal) valuation and taxes due.	Destroy in office after 10 years.	
21.19	TAXICAB AND LIMOUSINE TAX RECORDS Records concerning the levy of privilege taxes on taxicabs and limousines.	Destroy in office after 3 years.*	Authority: G.S. 20-97(d)

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MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.
-

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.
-

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.
-

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.
-

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-17) can be used for such requests.
-

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
“Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or

characteristics, made or received pursuant to law or ordinance in connection with the transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (state or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the state or of any county, unit, special district or other political subdivision of government.

Q. Is any person allowed to see my records?

- A. Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at reasonable times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. What about my confidential records?

- A. Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.
-

Q. Am I required to make available to the public copies of drafts that have not been approved?

- A. Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.
-

Q. What do I do with permanent records?

- A. Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**” (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.

- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.
- Adoptions, marriages, and divorces document changes in familial relationships and document citizenship. Though adoptions are confidential (not available for public inspection), they document citizenship and changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its citizens. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of citizens?
- Do they have a long-term impact on citizens?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on Page A-21. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See also GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance, STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS, Audits: Financial, STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the General Records Schedule for Local Government Agencies, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the General Records Schedule for Local Government Agencies or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g. a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/digital-signature-policy>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.
-

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a [Request for Disposal for Unscheduled Records](#) form if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. *Am I required to tell anyone about the destructions?*

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).



Destructions Log

County/Municipality					
Division		Section		Branch	
Location(s) of Records					

Records Series	Required Retention	Date Range	Volume (file drawers or MB)	Media (Paper, Electronic)		Date of Destruction	Method of Destruction	Authorization for Destruction
				P	E			

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

A. E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

A. We do not recommend printing e-mail for preservation purposes. Important metadata are lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

A. The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years. On the General Records Schedule: Local Government Agencies, see Leave Records (Standard 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:
- Parcel data
 - Street centerline data
 - Corporate limits data
 - Extraterritorial jurisdiction data
 - Zoning data, address points
 - Orthophotography (imagery)
 - Utilities
 - Emergency/E-911 themes

For more information, see **GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS.**

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. *What data formats, compression formats, and media should be used to preserve the data?*

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

You should also comply with guidelines and standards issued by the State Archives of North Carolina, which are available on its website.

Q. *Who should be responsible for creation and long-term storage of archived data?*

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

- A.** We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:
- Managing public records in North Carolina
 - Disaster preparedness and recovery
 - Digital communications

Q. Will you design a workshop especially for our office?

- A.** Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

- A.** No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public.

To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

- A.** Not at this time.

Q. Are the workshops available in an online format?

- A.** We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

Add a new item

Delete an existing item

Standard Number _____ Page _____ Item Number _____

Change a retention period

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

In accordance with the provisions of N.C. GEN. STAT. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature Title Date

Approved by:

Signature Requestor's Supervisor Date

Concurred by:

Signature Assistant Records Administrator State Archives of North Carolina Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:		Date (MM-DD-YYYY):
Phone (area code):	E-mail:	
County/Municipality:	Office:	
Mailing address:		

Records Series Title A group of records as listed in records retention schedule	Description of Records Specific records as referred to in-office	Inclusive Dates (1987-1989; 2005-present)	Approx. Volume of Records (e.g. "1 file cabinet," "5 boxes")	Retention Period As listed in records retention schedule

Requested by: _____

Signature Title Date

Approved by: _____

Signature Requestor's Supervisor Date

Concurred by: _____

Signature Assistant Records Administrator State Archives of North Carolina Date



File Plan

County/Municipality			
Division	Section	Branch	

Records Series	Records Creator	Records Owner (if record copy is transferred within the agency)	Media (Paper, Electronic, Scanned)			Required Retention	Location(s) of Records
			P	E	S		

INDEX

- 911 COMMUNICATION RECORDS AND RECORDINGS, 12
- ADMISSION RECORDS, 16
- AFFIRMATIVE ACTION FILE (AIRPORT), 1
- AIR POLLUTION SOURCE INFORMATION, 5
- AIR SPACE CONSTRUCTION FILES, 1
- AIRFIELD INSPECTION FILES, 1
- AIRPORT ACCESS CONTROL RECORDS, 1
- AIRPORT MASTER RECORD FILES, 1
- ALARM CALL REPORTS, 53
- ALTERNATIVE SENTENCING PROGRAMS, 53
- AMBULANCE CALL REPORTS, 12
- AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS, 31
- AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS, 31
- AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS, 31
- ANIMAL ABUSE AND CRUELTY RECORDS, 3
- ANIMAL COMPLAINT RECORDS, 3
- ANIMAL CONTROL RECORDS, 3
- ANIMAL LICENSING RECORDS (ANIMAL SERVICES), 4
- ANIMAL LICENSING RECORDS (TAX), 73
- ANIMAL SHELTER RECORDS, 4
- APPRAISAL PROJECT FILE (PUBLIC HOUSING), 25
- APPRAISAL REPORTS (STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING), 46
- ARREST PROCESSING TRACKING RECORDS, 53
- ARREST REPORTS, 54
- ART-IN-TRANSIT APPLICATIONS, 32
- AUCTION RECORDS, 54
- AUDIO AND VIDEO RECORDINGS (LAW ENFORCEMENT), 67
- BEER AND WINE TAXES AND RECORDS, 73
- BICYCLE LICENSE PLATE RECORDS, 73
- BLUEPRINTS AND SPECIFICATIONS, 5
- BOARD OF ADJUSTMENT CASE FILE, 19
- BUILDING AND FIRE SAFETY SYSTEM PLANS, 13
- BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS, 6
- CASE FILE - FELONIES, 54
- CASE FILE - MISDEMEANORS, 55
- CEMETERY DEEDS, 46
- CEMETERY INTERMENT RECORDS, 46
- CERTIFICATES OF APPROPRIATENESS, 20
- CERTIFICATION FILE. *See* Redevelopment Plans
- CHEMICAL ANALYSIS RECORDS. *See* DRUG AND ALCOHOL TESTING RECORDS
- CITATIONS RECORDS, 16
- COMMUNICATION RECORDS (LAW ENFORCEMENT), 55
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS, 26
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES, 26
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY, 26
- COMPLAINTS (LAW ENFORCEMENT), 56
- COMPOSITE INTERVIEWS, 56
- COMPREHENSIVE PLAN AND AMENDMENTS, 20
- COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN & AMENDMENTS, 34
- CONTINUUM OF CARE RECORDS, 27
- CONTROLLED SUBSTANCE EUTHANASIA LOG (ANIMAL SERVICES), 4
- CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS, 6
- CRIME ANALYSIS RECORDS, 56
- CRIMINAL RECORDS CHECKS, 27
- CUSTOMER (RIDER) IDENTIFICATION RECORDS, 32
- CUSTOMER USAGE RECORDS, 34
- DAILY DISPOSAL TICKETS (LANDFILL), 34
- DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, AND COMMON AREAS, 21
- DELINQUENT TAXPAYER RECORDS, 74
- DELINQUENT TAXPAYER RECORDS - ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY, 74
- DESTRUCTIONS LOG, A-10
- DETENTION FACILITY INCIDENT REPORTS, 57
- DETENTION FACILITY OPERATIONAL RECORDS, 57
- DETENTION FACILITY PHYSICAL FORCE RECORDS, 57
- DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS, 32
- DISCHARGE MONITORING REPORTS, 35
- DISCOUNT PASSES APPLICATIONS, 32
- DISPATCH RECORDS AND RECORDINGS (EMS AND FIRE DEPARTMENT), 13
- DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES, 58
- DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS, 58
- DNA SAMPLING RECORDS, 58
- DOMESTIC VIOLENCE RECORDS, 59
- DROUGHT CONTINGENCY PLANS, 6
- DRUG AND ALCOHOL TESTING RECORDS, 59

ELECTRIC POWER AND NATURAL GAS FACILITY
 ENGINEERING & SYSTEM PLANS, 39
 ELECTRIC POWER AND NATURAL GAS PERMITS AND
 APPROVAL RECORDS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM
 MAINTENANCE & REPAIR RECORDS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM
 MANAGEMENT PLANS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT
 RECORDS, 40
 ELECTRONIC RECORDINGS OF INTERROGATIONS, 60
 EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS, 28
 ENVIRONMENTAL IMPACT STUDIES, 21
 EROSION AND SEDIMENT AFFIDAVITS, 36
 EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES,
 6
 EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS, 37
 EROSION AND SEDIMENT CONTROL INSPECTIONS, 37
 EROSION AND SEDIMENT CONTROL PERMITS, 37
 EROSION AND SEDIMENT CONTROL PLANS, 7, 37
 EXCAVATION PERMITS, 47
 EXEMPTIONS (VARIANCE) RECORDS, 7
 FAÇADE PROJECT FILES, 28
 FIELD OBSERVATIONS, 60
 FILE PLAN, 22
 FINGERPRINT CARDS, 61
 FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE, 13
 FIRE DISPATCH FILE, 13
 FIRE INVESTIGATION CASE FILES, 14
 FIRE SAFETY INSPECTIONS AND PERMITS, 14
 FLOOD CERTIFICATIONS, 38
 FLOOD STUDIES, 38
 FORCIBLE ENTRY RECORDS, 61
 FUGITIVE WARRANTS CASE RECORDS, 61
 GOING OUT OF BUSINESS LICENSES, 7
 GRAVE OPENING ORDERS, 47
 GROUNDWATER MONITORING RECORDS, 7
 HISTORIES OF PET OWNERS, 4
 HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS,
 29
 HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES,
 29
 HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS
 (HOPWA) RECORDS, 30
 IDENTIFICATION PHOTOGRAPHS, 62
 ILLEGAL DUMPING FILE, 7
 INCIDENT RESPONSE REPORTS, 62
 INFRASTRUCTURE MAINTENANCE RECORDS, 47
 INMATE CLASSIFICATION RECORDS, 62
 INMATE COMMITMENT RECORDS, 63
 INMATE DEATH REPORTS, 63
 INMATE FINANCIAL RECORDS, 63
 INMATE GRIEVANCE RECORDS, 64
 INMATE MAIL, TELEPHONE, OR VISITOR RECORDS, 64
 INMATE MEAL RECORDS, 64
 INMATE MEDICAL RECORDS, 65
 INMATE PERSONAL IDENTIFICATION RECORDS, 65
 INMATE RESEARCH REQUESTS, 66
 INSPECTIONS, 7
 JUVENILE CASE HISTORY FILES, 66
 JUVENILE CASE HISTORY IDENTIFICATION RECORDS, 66
 JUVENILE DETENTION RECORDS, 66
 LABORATORY CASE RECORDS, 67
 LABORATORY OPERATIONS RECORDS, 44
 LAND DEVELOPMENT AND PLANNING STUDIES AND
 REPORTS (AIRPORT), 2
 LAND MARKETING AND DEVELOPMENT RECORDS. *See*
 HOME Investment Partnerships Program Records
 LANDFILL MONITORING REPORTS, 35
 LANDFILL OPERATIONAL PLAN, 35
 LANDFILL PERMITS, 36
 LANDFILL TONNAGE AND COST FILE, 8
 LANDLORD AGREEMENTS (UTILITIES), 40
 LANDLORD MONITORING RECORDS, 30
 LEAD AND COPPER COMPLIANCE RECORDS, 8
 MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS), 40
 METER TESTING AND CALIBRATION RECORDS (ELECTRIC,
 WATER, GAS), 41
 MOTOR VEHICLE RENTAL TAX RECORDS, 74
 MULTIPLE FIREARMS SALES REPORTS, 67
 MULTIPLE FIREARMS SALES REPORTS DESTRUCTION
 RECORDS, 67
 MUNICIPAL VEHICLE TAX RECORDS, 74
 NORTH CAROLINA FIRE INCIDENT REPORT, 14
 NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR
 DISPOSAL FILE, 36
 OFFICIALS FILE, 16
 OPEN SPACE CLASSIFICATION CASE FILE, 21
 OPERATOR SHIFT INSPECTION RECORDS, 32
 ORDINANCE VIOLATIONS CITATIONS, 68
 OUTSIDE WASTE CLEARANCE RECORDS, 36
 PARKS PLANNING FILE, 17
 PATIENT CARE REPORTS, 12
 PAWNSHOP RECORDS, 68
 PERMISSION TO SEARCH RECORDS, 68
 PERMITS
 CONSTRUCTION, 8
 HANDGUN, 69
 PUBLIC UTILITIES PROJECTS, 8
 TEMPORARY MANUFACTURED HOME, 22
 ZONING COMPLIANCE, 22
 PETITION & REGULATION RECORDS, 22
 PHARMACEUTICAL AND NARCOTICS RECORDS, 15

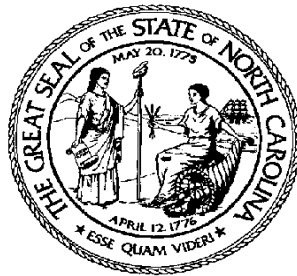
PLANNING FILE (STREET MAINTENANCE, PUBLIC WORKS,
 AND ENGINEERING), 47
 PLANNING REVIEW CASE FILE, 23
 POOL RECORDS, 17
 PREPARED FOOD AND BEVERAGE TAX RECORDS, 74
 PRETREATMENT PROGRAM RECORDS, 44
 PRISON RAPE ELIMINATION ACT (PREA) DATA FILE, 69
 PRISON RAPE ELIMINATION ACT (PREA) FILE, 69
 PRISONER AND MENTAL PATIENT TRANSPORT RECORD, 69
 PRIVILEGE LICENSES, TAXES, AND FEE RECORDS, 75
 PROJECT RECORDS – CANCELLED (PUBLIC WORKS AND
 ENGINEERING), 47
 PROJECT RECORDS – CORE (PUBLIC WORKS AND
 ENGINEERING), 48
 PROJECT RECORDS – ENGINEERING & COMPLIANCE, 49
 PROJECT SHEETS FILE (STREET MAINTENANCE, PUBLIC
 WORKS, AND ENGINEERING RECORDS, 50
 PROPERTY MANAGEMENT RECORDS. *See* HOME
 Investment Partnerships Program Records
 PROPERTY RECORDS - STOLEN AND RECOVERED, 70
 PUBLIC UTILITIES INSPECTION FORMS, 41
 PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE,
 AND REPAIR, RECORDS, 42
 PUBLIC WATER SANITARY SURVEY RECORDS, 44
 PURSUIT LOGS, 70
 RABIES VACCINATION RECORDS, 4
 RADIO LOGS (AIRPORT), 2
 RECREATION PROGRAMS, 17
 RECREATIONAL VEHICLE REGISTRATION RECORDS, 9
 RECYCLING WATER RECORDS, 42
 REDEVELOPMENT PLANS (PUBLIC HOUSING AND
 REDEVELOPMENT COMMISSION RECORDS), 30
 REHABILITATION RECORDS. *See* HOME Investment
 Partnerships Program Records
 RELOCATION RECORDS. *See* HOME Investment
 Partnerships Program Records
 REPORTS
 DAILY WATER AND WASTEWATER FACILITY OPERATORS
 LOGS, 38
 ENVIRONMENTAL PROTECTION AGENCY (EPA), 36
 WASTEWATER MAINTENANCE OPERATIONS, 43
 REQUEST FOR CHANGE IN LOCAL GOVERNMENT RECORDS
 SCHEDULE, A-19
 REQUEST FOR DISPOSAL OF ORIGINAL RECORDS
 DUPLICATED BY ELECTRONIC MEANS, A-21
 REQUEST FOR DISPOSAL OF UNSCHEDULED RECORDS,
 A-20
 REZONING RECORDS AND INDEXES, 23
 RIDE-ALONG PROGRAM RECORDS, 70
 RIGHT-OF-WAY ACQUISITION WORKING RECORDS, 50
 ROOM OCCUPANCY TAX RECORDS, 75
 ROUTE HISTORY RECORDS, 33
 SCHEDULE "B" LICENSES, 76
 SEAT BELT AND RESTRAINT SYSTEM RECORDS, 33
 SERVICE INTERRUPTION RECORDS, 42
 SEWER JETTING AND VECTORING RECORDS, 45
 SEXUAL OFFENDER RECORDS, 70
 SLUDGE TREATMENT RECORDS, 45
 SOCIAL MEDIA, A-12
 SPECIAL USE PERMIT RECORDS AND INDEX, 21
 STORMWATER DEVIATION PERMITS, 45
 STREET NAME AND HOUSE NUMBER FILES, 50
 STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS, 51
 SUBDIVISION RECORDS, 24
 SURVEY FIELD RECORDS, 51
 TAP AND HOOK UP RECORDS, 43
 TAX ABSTRACTS AND LISTS, 76
 TAX EXEMPT PROPERTY FILE, 76
 TAX LEDGER CARDS OR SHEETS, 76
 TAX LEVY AND SEIZURE RECORDS, 77
 TAX LIEN SALES, 77
 TAX REBATES, 77
 TAX SCROLLS, 77
 TAXICAB AND LIMOUSINE TAX RECORDS, 77
 TEXT MESSAGES, A-12
 TICKET STUBS, 18
 TRAFFIC ACCIDENT REPORTS, 71
 TRAFFIC ANALYSIS, 51
 TRAFFIC CITATIONS, 71
 TRAFFIC VIDEO RECORDINGS AND DATA, 52
 TRAFFIC WARNINGS, 71
 TRANSIT SCHEDULES, 33
 TRANSIT SERVICE APPLICATIONS, 32
 TRESPASS RECORDS, 72
 TROUT BUFFER VARIANCES, 38
 UNSAFE BUILDINGS FILE, 9
 VALVE OPERATION FILE, 9
 VANPOOL DRIVER APPLICATIONS, 33
 VARIANCES (PLANNING AND REGULATION OF
 DEVELOPMENT), 24
 VEHICLE TOWING RECORDS, 72
 VIOLATIONS
 BUILDING AND HOUSING, 9
 SOLID WASTE MANAGEMENT, 10
 WATER CONSERVATION, 10
 ZONING, 24
 WASTEWATER POLLUTION CONTROL AND ABATEMENT
 RECORDS, 10
 WASTEWATER QUALITY ANALYSIS RECORDS, 10
 WATER & WASTEWATER PERMITS & APPROVAL RECORDS,
 43
 WATER & WASTEWATER SYSTEM INSPECTIONS & TESTS,
 45
 WATER ANALYSIS, 11
 WATER QUALITY VIOLATION RECORDS, 45

WATER SYSTEM OPERATIONS RECORDS, 11

WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS
FILE, 11

RECORDS RETENTION AND DISPOSITION SCHEDULE

GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

CONTENTS

Approval	iv
Front Matter	
Executive Summary	v
Legend for Records Schedule	vii
Records Retention and Disposition Schedule	
Standard 1: Administration and Management Records	1
Standard 2: Budget, Fiscal, and Payroll Records	23
Standard 3: Geographic Information System Records	36
Standard 4: Human Resources Records	43
Standard 5: Information Technology Records	61
Standard 6: Legal Records	67
Standard 7: Public Relations Records	75
Standard 8: Risk Management Records	80
Standard 9: Workforce Development Records	86
Appendix	
Managing Public Records in North Carolina	A-1
Audits, Litigation, and Other Official Action	A-5
Transitory Records	A-6
Destruction of Public Records	A-8
Sample Destructions Log	A-10
Electronic Records: E-mail, Born Digital Records, and Digital Imaging	A-11
Geospatial Records	A-13
Security Preservation Copies of Records	A-15
Disaster Assistance	A-17
Staff Training	A-18
Request Forms	
Request for Change in Records Schedule	A-19
Request for Disposal of Unscheduled Records	A-20
Request for Disposal of Original Records Duplicated by Electronic Means	A-21
File Plan	A-22
Related Records Series in Program Schedules	A-23
Index	A-30

2021 General Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 General Records Schedule: Local Government Agencies**:

1. Administration and Management Records
2. Budget, Fiscal, and Payroll Records
3. Geographic Information System Records
4. Human Resources Records
5. Information Technology Records
6. Legal Records
7. Public Relations Records
8. Risk Management Records
9. Workforce Development Records

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

G.S. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, G.S. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends.*” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends.*” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends.*”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by this schedule; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.


Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

² Ibid.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. This schedule supersedes previous versions of this schedule and any localized amendments; it is to remain in effect from the date of approval until it is reviewed and updated.

APPROVAL RECOMMENDED


Municipal/County Clerk or Manager
Title: _____



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: _____



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

Municipality/County: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the Local Agency Program Retention and Disposition Schedules. See the appendix for Related Records Series Found in Local Agency Program Schedules.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.

- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or may include confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS**

Official records pertaining to the authority, operating philosophy, methods, primary functions, and routine office administration of local agencies.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.01	ABSTRACTS OF MUNICIPAL ELECTIONS Copies of abstracts prepared by the County Board of Elections and forwarded to the municipal clerk.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>4 Years</u> <i>Retention Note: Official record maintained permanently by the County Board of Elections.</i>	Authority: G.S. 163-300
1.02	ACCREDITATION RECORDS Records documenting accreditations and certifications received by the agency. Includes applications, final reports, and other related records. Also includes evaluations of the agency by outside entities.	Destroy in office 5 years after superseded or obsolete.	Authority: 10A NCAC 48B
1.03	ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES @ Records documenting requirements or directives promulgated by the agency for the conduct of a business or activity on agency premises or under agency authority.	Destroy in office when superseded or obsolete.	

1 : Administration and Management


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.04	<p>AUDITS: PERFORMANCE @</p> <p>Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.</p> <p>SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	<p>a) Retain in office permanently reports related to internal compliance or operational audits, hazardous material, or those that document a significant change in agency practices.</p> <p>b) Destroy in office PCI attestation reports after 3 years.</p> <p>c) Destroy in office remaining audit reports after 10 years.</p> <p>d) Destroy in office documentation of corrective measures 2 years after their implementation.</p> <p>e) Destroy in office working papers and remaining records when superseded or obsolete.</p>	
1.05	<p> BLUEPRINTS AND SPECIFICATIONS @</p> <p>Blueprints and specifications of agency owned buildings and facilities. Includes as-built plans and related records concerning approved changes.</p>	<p>a) Transfer as-built drawings to new owner when agency relinquishes ownership of building or facility.</p> <p>b) Retain in office as-built drawings for life of structure and then destroy.</p> <p>c) Destroy in office blueprints, floorplans, and other preliminary design and construction documents when superseded or obsolete.</p>	Confidentiality: G.S. 132-1.7

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.06	<p>BONDS Records documenting written guarantees from a third party, including bid bonds, payment bonds, performance bonds, and surety bonds.</p> <p>SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), and Projects (below).</p>	Destroy in office 5 years after expiration or cancellation.	
1.07	<p>BULLETINS Internal information sharing materials that circulate information within the agency. Also includes memoranda and newsletters.</p>	Destroy in office when superseded or obsolete.	
1.08	<p>BUSINESS CERTIFICATION RECORDS Applications and supporting documentation submitted by businesses to be certified as a Small Business Enterprise (SBE) or other classification.</p>	<p>a) Destroy in office all documentation 3 years after most recent recertification.</p> <p>b) If certification was never issued, destroy in office all documentation when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>4 Years</u></p>	
1.09	BUSINESS DEVELOPMENT SUBJECT FILE	Destroy in office after 3 years.	
1.10	CALENDARS OF EVENTS AND APPOINTMENTS	Destroy in office when superseded or obsolete.	
1.11	<p>CENSUS PROJECT RECORDS Records created to assist the U.S. Census Bureau with the decennial census.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>Records are submitted to the US Census Bureau.</u></p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.12	CHARTER RECORDS Charter and charter proceedings related to adoption, amendment and/or repeal.	Retain in office permanently.	
1.13	COLLECTED DATA Information and statistics compiled and analyzed for research purposes or to support the functions of the agency. SEE ALSO: Data Warehouses (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	Destroy in office when superseded or obsolete.	If data contains confidential information, abide by relevant restrictions.

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.14	<p>CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS @</p> <p>Records concerning objections, dissatisfaction, or disagreements with actions or positions taken or not taken by the agency. Includes comments and petitions submitted by constituents requesting action as well as routine requests for service. Also includes requests for reasonable accommodation to the general public under Title II of the Americans with Disabilities Act, Housing and Urban Development Act, 1973 Rehabilitation Act, and Title VII of the Civil Rights Act of 1964; including constituent requests, survey of agency buildings to determine accessibility to the physically handicapped, proposals for implementation, correspondence (including e-mail), and resolutions.</p> <p>SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS).</p>	<p>a) Transfer records as applicable to Litigation Case Records (STANDARD 6: LEGAL RECORDS).</p> <p>b) Destroy in office comments, complaints, petitions, and requests 1 year after resolution.*</p> <p>c) Destroy in office accommodation requests 2 years after resolution.*</p>	<p>Authority: 42 USC 12132</p>
1.15	<p>CONSTITUENT SURVEYS</p> <p>Surveys and related records addressing agency services, policies, and other concerns.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after _____ 1 Year _____</p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.16	<p>CORRESPONDENCE AND MEMORANDA Administrative and management correspondence/memoranda (including e-mail) written or received by the office concerning agency authority, operating philosophy, purpose, methods, and any other function.</p> <p>For information on handling e-mail and text or instant messages, see ELECTRONIC RECORDS, page A-11. SEE ALSO: Public Bodies: Correspondence (below) and Legal Correspondence (STANDARD 6: LEGAL RECORDS).</p>	<p>a) Transfer correspondence (including e-mail) with historical value to History Records (below), after 3 years.</p> <p>b) Destroy routine administrative correspondence and memoranda after 1 year.</p> <p>c) Destroy in office remaining records after 3 years.</p> <p><i>Retention Note: The correspondence (including e-mail) of the most senior administrator has historical value and should be retained permanently.</i></p>	
1.17	<p>CUSTOMER CALL CENTER RECORDINGS @ Recordings of calls to customer service centers made for quality assurance and training purposes.</p>	Destroy in office after 30 days.	
1.18	<p>EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS @ Records concerning the maintenance, repair, routine testing, and inspection of agency owned equipment and vehicles. Also includes warranties.</p> <p>SEE ALSO: Grants (below), and System Maintenance Records: Hardware Repair or Service (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Destroy in office records documenting routine inspections, janitorial cleaning, and routine maintenance of equipment and vehicles after 1 year.*</p> <p>b) Destroy in office records documenting all other maintenance and repairs after 3 years.*</p> <p>c) Destroy in office warranties 1 year after expiration.</p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.19	<p>EQUIPMENT AND VEHICLE REFERENCE RECORDS</p> <p>Includes operation, specification, and technical manuals. Also includes brochures, bulletins, and related documentation.</p>	Destroy in office when superseded or obsolete.	
1.20	<p>EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS</p> <p>Records documenting the assignment, request, and usage of agency assets. Also includes mileage and checkout logs, fuel consumption reports, reservation requests, authorizations, utility usage logs, and similar records.</p>	<p>a) Destroy in office after 3 years if records are used for allocating costs or determining payment under rental or lease agreements.*</p> <p>b) Destroy in office remaining records after 1 year.</p>	
1.21	<p>FACILITY MAINTENANCE, REPAIR, AND INSPECTION RECORDS</p> <p>Records documenting maintenance, repair, and inspection of agency-owned facilities, including warranties on said repairs. Also includes any real property owned by the agency.</p> <p>SEE ALSO: Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS), Property Management Records (below).</p>	<p>a) Destroy in office records documenting system repair and improvement (including plumbing, electrical, fire, and other systems) after 3 years.</p> <p>b) Destroy in office records documenting routine inspections, janitorial cleaning, environmental monitoring, and routine maintenance of facilities after 1 year.</p> <p>c) Destroy in office warranties 1 year after expiration.</p>	
1.22	<p>FORMS AND TEMPLATES</p> <p>Blank forms, templates, and letterhead used to create agency records.</p>	Destroy in office when superseded or obsolete.	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.23	<p>GRANT PROPOSALS</p> <p>Proposals submitted for grants, including applications, correspondence (including e-mail), and other related records.</p>	<p>a) Transfer records concerning approved grants to Grants (below).</p> <p>b) Destroy in office rejected or withdrawn grant proposals when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>3 Years</u></p>	
1.24	<p>GRANTS[@]</p> <p>Records concerning approved federal, state, and private grants. File includes applications, reports, records of equipment purchased with grant funds, and all relevant programmatic records. Also includes any required certifications and disclosures, documentation about grants issued by the agency, and research records generated as part of a grant project.</p> <p>SEE ALSO: Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	<p>a) Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.</p> <p>b) Destroy in office records of state and private grants 5 years after final financial report is filed.*</p> <p>c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed.</p> <p>d) Destroy in office records not relating to a specific grant after 1 year.</p> <p><i>Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.</i></p>	<p>Retention: 09 NCAC 03M .0703 2 CFR 200.333</p>

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.25	HISTORICAL DESIGNATIONS RECORDS Records concerning the awarding of historical markers by the agency. Includes applications, review materials, and list of markers.	a) Retain in office permanently the list of historical markers along with the accepted applications. b) Destroy in office after 1 year rejected applications. c) Destroy in office remaining materials after 3 years.	
1.26	HISTORY RECORDS (AGENCY AND EMPLOYEES) Records concerning the history of the agency and its employees. Includes published and unpublished histories, biographical data, photographs, newspaper clippings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u>	
1.27	IMPROPER CONDUCT INVESTIGATIONS Records concerning investigations triggered by questions about ethics or conduct within an agency, such as whistleblower reports or allegations of fraud. Includes complaints, reports, investigations, and other related records. Also includes records from an ombuds office.	Destroy in office 3 years after resolution.*	
1.28	INDICES @ Listings of where specific information can be found.	Destroy in office when superseded or obsolete.	
1.29	INTERAGENCY PROGRAMS Records of programs involving more than one government agency. Includes resource materials, program information, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years after program end</u>	

1 : Administration and Management


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.30	INVENTORIES @ Inventories describing the type of property (including equipment and facilities other and fixed assets), its location, and related information. Also includes inventory control and usage records, such as requisitions/draw tickets, mileage logs, request forms, and other related records.	a) Destroy in office lists of properties, facilities, fixed assets, supplies, and surplus property when superseded or obsolete. b) Destroy in office inventory control and usage records after 3 years.	
1.31	LEGISLATION AND REGULATORY RECORDS Notices and copies of proposed or adopted state or federal legislation or regulations affecting the agency.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u> </u> obsolete or superseded	
1.32	LOGISTICS MATERIALS Records concerning scheduled plans of agency personnel and activities. Includes routine notices, task lists, and arrangements.	Destroy in office when superseded or obsolete.	
1.33	MAIL: UNDELIVERABLE/RETURNED Outgoing agency mail returned by the post office for any reason, including insufficient postage, incorrect address, forwarding order expired, etc. Also includes outgoing e-mail returned for any reason.	Destroy in office after 30 days. <i>Retention Note: If notification is necessary for a particular process, reference the relevant case file for disposition instructions (e.g., tax notifications).</i>	
1.34	 MAILING AND DISTRIBUTION RECORDS Includes mailing and meeting notification lists, e-mail distribution lists, Sunshine Lists, and related documentation of transactions with the U.S. Postal Service, state courier, or private carriers.	a) Destroy in office Sunshine Lists when superseded or obsolete. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: G.S. 132-1.12 G.S. 132-1.13

1: Administration and Management


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.35	MEMBERSHIP RECORDS Records concerning associations, organizations, groups, etc., with which the agency is involved. Includes records concerning memberships or registrations on behalf of the agency or agency personnel.	Destroy in office when superseded or obsolete.	
1.36	MISCELLANEOUS (NON-BUILDING) APPLICATIONS, LICENSES, AND PERMITS Includes, but not limited to, applications and permits regarding free government-issued business permits, burning, special events, and landscape establishment.	a) Destroy in office 1 year after expiration of license/permit. b) Destroy in office applications for which a license/permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	
1.37	 OFFICE AND PROPERTY SECURITY RECORDS Records concerning the security of agency offices, facilities, vehicles, equipment, property, and personnel. Includes visitors' register; security, employee, or contractor access to facilities or resources; and surveillance system reports and recordings. SEE ALSO: Employee Security Records (STANDARD 8: RISK MANAGEMENT).	a) If the recording necessitates law enforcement action, transfer to the appropriate agency. b) If the recording becomes evidence in a personnel investigation or lawsuit, transfer to Disciplinary Actions (STANDARD 4: HUMAN RESOURCES RECORDS), or Litigation Case Records (STANDARD 6: LEGAL RECORDS). c) Destroy in office recordings not required to support known investigations or litigation after 30 days. d) Destroy in office remaining records after 1 year.	Confidentiality: G.S. 132-1.7

1 : Administration and Management

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.38	<p>ORDINANCES Includes code of ordinances.</p> <p>See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.</p>	<p>a) Retain in office official copy permanently.</p> <p>b) Destroy in office ordinance development records when ordinance is no longer in effect.</p> <p>c) Destroy in office additional copies (including tabled or failed ordinances) when reference value ends.± Agency Policy: Destroy in office after <u>Obsolete</u></p>	
1.39	<p>PEST CONTROL Records concerning pest abatement or eradication programs overseen by the agency.</p> <p>SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).</p>	Destroy in office after 3 years.*	
1.40	<p>PHONE LOGS Records documenting calls placed and received in the course of conducting agency business.</p> <p>SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Voice over Internet Protocol (VoIP) Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	Destroy in office after 1 year.	

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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.41	<p>POLICIES AND PROCEDURES @</p> <p>Records documenting the formulation, planning, and adoption of policies, procedures, and functions of the agency and its departments. File also includes organizational charts, reorganization studies, and similar records describing the arrangement and administrative structure of the agency.</p> <p>SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS), Electronic Records Policies and Procedures (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
1.42	<p>POLL LIST/REGISTRATION LIST/ROSTER/AUTHORIZATION TO VOTE (ATV) @</p> <p>Lists documenting registered electors and votes cast prior to County Board of Elections taking over municipal elections. Includes electronic or paper ATV related records such as ATV books, forms, unused stickers, lists, registers, indexes, or similar records used to verify persons are registered voters at each polling location.</p>	Contact State Archives of North Carolina prior to destroying old poll books and voter registration books.	<p>Authority: G.S. 163 Art. 15A G.S. 163-166.7 08 NCAC 10B .0103 52 USC Chap. 205</p>
1.43	PRICE QUOTATIONS	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>7 Years</u>.</p>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.44	<p>PROCLAMATIONS AND ORDERS Proclamations and orders issued by the governing board.</p>	<p>a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u> Obsolete or Supersided </u></p>	
1.45	<p>PROJECTS @ Includes project correspondence (including e-mail), feasibility studies, final reports, specifications, assessments, notices to proceed, cost estimates, change orders, statements of work, and similar documentation. SEE ALSO: Project Documentation (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Retain in office records with historical value permanently. b) Destroy in office remaining records 3 years after completion of project.</p>	
1.46	<p>PROPERTY MANAGEMENT RECORDS Includes appraisals of the financial valuation of agency-owned property as well as surveys, plats, and maps. SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).</p>	<p>Destroy in office when superseded or obsolete.</p>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.47	<p>PUBLIC BODIES: AGENDA AND MEETING PACKETS Includes agendas and copies of supporting documentation and exhibits submitted and discussed during meetings of public bodies. Also includes documentation of outside meetings attended by agency personnel.</p> <p>SEE ALSO: Public Bodies: Minutes (below).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u></p>	
1.48	<p>PUBLIC BODIES: APPLICATIONS FOR APPOINTMENT Applications and related records received from individuals applying for appointments to serve on public boards, commissions, councils, and committees.</p>	<p>a) Destroy in office records concerning appointed individuals 1 year after expiration of term.</p> <p>b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u></p>	
1.49	<p>PUBLIC BODIES: APPOINTMENT REPORTS Includes annual appointment reports filed with the NC Department of the Secretary of State.</p>	Destroy in office after 2 years.	Authority: G.S. 143-157.1
1.50	<p>PUBLIC BODIES: AUDIO AND VIDEO RECORDINGS OF MEETINGS</p> <p>SEE ALSO: Public Bodies: Minutes (below).</p>	<p>Destroy in office after approval of official written minutes.</p> <p><i>NOTE: If these serve as the official minutes, as allowed by G.S. 143-318.10(e), their retention should be permanent. These disposition instructions apply to recordings produced solely for the purpose of generating official written minutes.</i></p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.51	<p>PUBLIC BODIES: CORRESPONDENCE Records documenting internal and external communications of governing and advisory board members. Includes correspondence (including e-mail) related to decision-making, policy development, and other high-level planning as well as logistical communications.</p>	<p>a) Transfer correspondence (including e-mail) with historical value to History Records (above), after 3 years. b) Destroy in office remaining records after 3 years.</p>	
1.52	<p>PUBLIC BODIES: MEETING NOTICES Includes notices and regular meeting schedules.</p> <p>SEE ALSO: Affidavits of Publication (STANDARD 6: LEGAL RECORDS), Publicity Records (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	<p>Destroy in office after 1 year.</p>	
1.53	<p>PUBLIC BODIES: MEMBER FILES Records concerning members of public boards, commissions, councils, and committees. Includes codes of conduct, ethics statements, agreements, notices of resignation, and other related records. Also includes biographical information and waivers.</p> <p>SEE ALSO: Oaths of Office (STANDARD 6: LEGAL RECORDS), Public Bodies: Applications for Appointment (above).</p>	<p>a) Retain in office records with historical value permanently. b) Destroy in office 1 year after superseded or obsolete waivers from board members choosing not to receive stipend/per diem payments. c) Destroy in office remaining records 1 year after service ends.</p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.54	<p>PUBLIC BODIES: MINUTES Includes minutes of the governing board and all subsidiary and advisory boards. Subsidiary boards are defined as boards that exercise or are authorized to exercise legislative, policy-making, quasi-judicial, or administrative functions. Also includes minutes of subcommittees of the governing board and its subsidiary and advisory boards.</p> <p>See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.</p> <p>SEE ALSO: Ordinances (above), Public Bodies: Agenda and Meeting Packets (above), Public Bodies: Audio and Video Recordings of Meetings (above), Resolutions (below).</p>	<p>a) Retain in office permanently official minutes of the governing board and its subsidiary boards as well as all attachments necessary to understand the body's actions.</p> <p>b) The official minutes of advisory boards may be destroyed only upon approval by the State Archives of North Carolina. The State Archives reserves the right to designate the minutes of any advisory board as permanent.</p> <p>c) Destroy in office minutes of committees or subcommittees when reference value ends, if the minutes or actions and decisions of the committee are entered as part of the minutes of the parent board. If minutes or actions and decisions of the committee or subcommittee in question are not entered as part of the minutes of the parent board, the State Archives reserves the right to designate the minutes as permanent.±</p> <p>Agency Policy: Destroy in office after <u>---</u> Retain permanently</p>	<p>Authority: G.S. 143-318.10</p>
1.55	<p>RATE AND FEE SCHEDULES @ Records relating to rates, fees, and regulations concerning agency services.</p>	<p>Destroy in office when superseded or obsolete.</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.56	<p>REBATE PROGRAM RECORDS</p> <p>Applications, receipts, and related records concerning rebate programs sponsored by the agency. These records document programs and incentivized actions that residents may opt into.</p>	<p>a) Destroy in office financial records 3 years after approval.*</p> <p>b) Destroy in office applications 1 year after approval.</p> <p>c) Destroy in office denied applications when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	
1.57	<p>RECORDS MANAGEMENT</p> <p>Includes correspondence (including e-mail) with state and/or federal agencies with regards to records retention. Also includes records disposition documentation, file plans, and copies of records retention and disposition schedules.</p>	<p>a) Retain in office documentation concerning the final disposition of records permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
1.58	<p>REFERENCE (READING) FILE</p> <p>Subject files containing informational copies of records organized by areas of interest. Also includes materials that have no regulatory authority for the recipient and are received from outside the agency or from other units within the agency as well as reference copies of documents where another individual or agency is responsible for maintaining the record copy.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>Information has been retained or transferred</u></p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.59	<p>REPORTS AND STUDIES @</p> <p>Records concerning the performance of a department, program, or project, as well as those created for planning purposes. Includes all annual, sub-annual, or irregularly prepared research studies, reports, and studies generated by an agency or prepared by consultants hired by the agency. Also includes reports required to be submitted to the agency.</p> <p>SEE ALSO: Accident/Incident Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Audits: Performance (above), Budget Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Civil Rights Records (STANDARD 6: LEGAL RECORDS), Financial Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Grants (above), Lost, Stolen, or Damaged Property Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Projects (above), Public Bodies: Appointment Reports (above), Strategic Plan (below), and Unemployment Compensation Reports (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Retain in office permanently 1 copy of all annual and biennial reports written by the agency.</p> <p>b) Retain in office permanently reports and studies prepared by request of an agency's governing body or a court.</p> <p>c) Destroy in office after 3 years reports prepared monthly, bimonthly, or semi-annually.</p> <p>d) Destroy in office after 1 year activity reports concerning workload measurements, time studies, number of jobs completed, etc., prepared on a daily or other periodic basis.</p> <p>e) Destroy in office when superseded or obsolete reports required to be submitted to the agency.</p> <p>f) Destroy in office remaining reports and studies when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Year</u>.</p> <p><i>Retention Note: Reports and studies listed elsewhere in this schedule should be retained the specified period of time.</i></p>	

1: Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.60	<p>REQUESTS FOR INFORMATION Requests received and responses issued by the agency.</p> <p>SEE ALSO: Public Records Requests (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	Destroy in office after 1 year after resolution.	
1.61	<p>REQUESTS FOR PROPOSALS (RFP) Proposals submitted by vendors in response to requests from agency. Also includes notices and evaluations produced by the agency.</p> <p>SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Price Quotations (above).</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>7 Years</u></p>	
1.62	<p>RESOLUTIONS File consists of resolutions indicating date, issues or policy involved, and appropriate signatures.</p> <p>See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.</p>	<p>a) Retain in office permanently one copy of final resolution.</p> <p>b) Retain in office permanently resolution development records with historical value.</p> <p>c) Destroy in office additional copies of resolutions (including those tabled or failed) along with all remaining development records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>Obsolete</u></p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.63	STAFF MEETINGS FILE Records concerning meetings of internal committees, groups, or task forces along with external meetings attended by agency personnel. Includes minutes, agendas, meeting packets, visual aids, presentations, notes, recordings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 1 year.	
1.64	STRATEGIC PLAN @ Long-range plan outlining policies, guidelines, and plans for future development of the agency. Includes official copy of strategic plan and all background surveys, studies, and reports. Also includes business plans as well as mission statements, goals, and objectives.	a) Retain in office strategic plans permanently. b) Destroy in office background surveys, studies, and reports 5 years after adoption of plan. c) Destroy in office business plans 2 years after execution of plan. d) Destroy in office remaining records when superseded or obsolete.	
1.65	SURPLUS PROPERTY Inventories and reports of agency property to be surplus.	Destroy in office 3 years after disposition of property.*	
1.66	TRACKING MATERIALS Records intended to verify the receipt of information, such as certified mail receipts.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.67	<p>TRAVEL REQUESTS Requests and authorizations for travel. Includes forms and itineraries.</p> <p>SEE ALSO: Price Quotations (above), Travel Reimbursements (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	Destroy in office after 1 year.*	
1.68	<p>VEHICLE REGISTRATION CARDS North Carolina registration cards for vehicles in the agency fleet.</p> <p>SEE ALSO: Vehicle Titles (STANDARD 6: LEGAL RECORDS).</p>	Destroy in office when superseded.	
1.69	<p>WORK ORDERS Includes date and location of work, cost of materials used and labor, type of work performed, and other related records regarding the repairs of equipment, facilities, and vehicles.</p>	<p>a) If this is the only record documenting completed work, follow disposition instructions for Facility Maintenance, Repair, and Inspection Records (above), or Equipment and Vehicle Maintenance, Repair, and Inspection Records (above).</p> <p>b) Destroy in office remaining records 1 year after work is completed.*</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS**

Records created and accumulated concerning the managerial control, budgeting, disbursement, collection, and accounting of the agency.

Note: Per 26 CFR 1.148-5(d)(6)(iii)(E), all records necessary to support the tax-exempt status of an agency debt issue must be retained for the life of the debt plus 3 years.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.01	ACCOUNTS PAYABLE Records concerning the status of accounts in which the agency owes money to firms or individuals. Includes invoices, reimbursements, receipts or bills of sale, check registers, and subsidiary registers. Also includes stop payment notices.	a) Destroy in office 5 years after payment documentation of reimbursement for business expenses to employees. b) Destroy in office all remaining records 3 years after payment.*	Retention: 04 NCAC 24D .0501(a)(3)(I)
2.02	ACCOUNTS RECEIVABLE @ Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.	Destroy in office 3 years after collection.*	G.S. 105A

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.03	ACCOUNTS UNCOLLECTABLE Records of accounts deemed uncollectable, including returned checks, write-off authorizations, and other related records.	Destroy in office 3 years after account is determined to be uncollectable.*	
2.04	ANNUAL BUDGET Annual budget and budget message submitted to governing board for approval. SEE ALSO: Budget Reports (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 3 years. <i>Retention Note: Annual budgets should be entered into the minutes of the governing board.</i>	Authority: G.S. 159-11
2.05	ARBITRAGE RECORDS Records concerning arbitrage rebate calculations and funds rebated.	Destroy in office 3 years after final redemption date of the bonds and after all related debts and obligations have been satisfied.*	Authority: 26 CFR 1.148-3
2.06	AUDITS: FINANCIAL @ Records concerning internal and external audits. Includes reports, working papers, and related records. SEE ALSO: Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently final reports related to internal compliance or operational audits or those that document a significant change in agency practices or have significant administrative value. b) Destroy in office after 10 years final reports related to internal accounting systems and controls and those with limited administrative value. c) Destroy in office working papers and remaining records when superseded or obsolete.*	Authority: G.S. 159-34
2.07	AUTHORIZATION FORMS Authorization to purchase materials.	Destroy in office after 3 years.*	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.08	BANK STATEMENTS AND RECONCILIATIONS Includes bank statements, canceled checks, deposit slips, and reconciliation reports.	Destroy in office after 3 years.*	
2.09	BIDS FOR DISPOSAL OF PROPERTY Records concerning the disposal of surplus property. Includes information about various disposition procedures used, such as sealed bids and public auction. SEE ALSO: Accounts Receivable (above).	Destroy in office all records after the disposition of property has been recorded in governing board's minutes.*	Authority: G.S. 153A-176
2.10	BIDS FOR PURCHASE Records documenting quotes to supply products and services. Includes advertisements, tabulations, awards letters, records of bids, good faith effort documentation, and related records concerning accepted and rejected bids.	a) Transfer records to Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS) when bid is approved. b) Destroy in office bid records not awarded or opened after 1 year.*	Authority: G.S. 143 Article 8
2.11	BOND CLOSING RECORDS Includes applications, agreements, tax records, contracts, official statements, legal opinions, rating letters, public hearing bonds, title insurance, deeds of trust, and other related records concerning bonds issued by the agency. Also includes records concerning expenditure and/or investment of bond proceeds.	Destroy in office 6 years after final maturity.*	Authority: G.S. 159 Article 7

2: Budget, Fiscal, and Payroll

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.12	BOND REGISTER Records of all bonds, notes, and coupons issued by the agency detailing the purpose of issuance, the date of issue, serial numbers (if any), denomination, maturity date, and total principal amount.	Retain in office permanently.	Authority: G.S. 159-130
2.13	BONDS, NOTES, AND COUPONS	Destroy in office 1 year from date of payment.	Authority: G.S. 159-139
2.14	BUDGET ADMINISTRATION RECORDS Records of budget administration. Includes research, correspondence (including e-mail), and other related records.	Destroy in office after 2 years.*	
2.15	BUDGET EXECUTION RECORDS Records of authorizations to move funds between budget codes.	Destroy in office when released from audits.	
2.16	BUDGET REPORTS Includes daily detail reports and monthly budget reports. Also includes contract budget and expenditure reports and summaries of tax allocations. SEE ALSO: Annual Budget (above).	a) Destroy in office daily detail reports after 1 year.* b) Destroy in office remaining reports after 3 years.*	
2.17	BUDGET REQUESTS AND WORKING PAPERS Includes budget requests, cost estimates, expenditures, program requests, salary and wage lists, correspondence (including e-mail), and related records.	Destroy in office after 3 years.*	Authority: G.S. 159-10

2: Budget, Fiscal, and Payroll



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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.18	<p>BUDGET RESOLUTIONS AND ORDINANCES Includes project ordinances, budget resolutions, and amendments.</p> <p>SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain official copies in the minutes of the governing board.</p> <p>b) Destroy in office remaining copies when reference value ends.± Agency Policy: Destroy in office after _____ official copy is approved</p>	<p>Authority: G.S. 159-8 G.S. 159-13 G.S. 159-13.2 G.S. 159-15</p>
2.19	<p>COST ALLOCATION PLANS Accounting report that calculates and spreads agency-wide indirect costs to departments and funds that receive a service from other departments.</p>	Destroy in office after 3 years.*	
2.20	<p> CREDIT/DEBIT/PROCUREMENT CARD RECORDS Records of assignation of agency credit cards and purchasing cards along with authorization logs.</p>	Destroy in office when superseded or obsolete.*	Confidentiality: G.S. 132-1.2(2)
2.21	<p>DONATIONS AND SOLICITATIONS Records concerning requests made to agency by outside organizations. Includes applications and other related records.</p> <p>SEE ALSO: Fund Drive and Event Records (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	<p>a) Destroy in office records supporting approved donations 1 year after payment.</p> <p>b) Destroy in office rejected applications after 30 days.</p>	
2.22	<p> ELECTRONIC FUNDS TRANSFERS (EFT) Includes forms authorizing electronic transfer of monies via wire transfer or automated clearing house (ACH) as well as ACH bank reports.</p>	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 14-113.20

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.23	ESCHEATS AND UNCLAIMED PROPERTY Records containing information required to be included in holder reports submitted to the State Treasurer's office.	a) Destroy in office after 10 years if report was filed prior to July 16, 2012.* b) Destroy in office after 5 years if report was filed on or after July 16, 2012.*	Authority: G.S. 116B-60 Retention: G.S. 116B-73
2.24	FINANCIAL JOURNALS AND LEDGERS	a) Destroy in office year-end summaries of receipts and disbursements after 3 years.* b) Destroy in office daily, monthly, or quarterly transaction detail journals and ledgers after 1 year.*	
2.25	FINANCIAL REPORTS	a) Destroy in office annual financial reports or other reports generated to inform decision-making after 3 years.* b) Destroy monthly or quarterly reports generated for operational purposes after 1 year. c) Destroy logs and distribution reports generated to track transactions when released from audits.	
2.26	GOVERNMENT EMPLOYEES RETIREMENT SYSTEM MONTHLY REPORTS Reports produced by the North Carolina Department of State Treasurer regarding the Teachers' and State Employees' Retirement System (TSERS) and the Local Governmental Employees' Retirement System (LGERs).	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	

2: Budget, Fiscal, and Payroll

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.27	<p>GRANTS: FINANCIAL @</p> <p>Records concerning approved federal, state, and private grants received or issued by the agency. Includes all relevant accounting, purchasing, payroll, and other financial records.</p> <p>SEE ALSO: Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy records supporting the expenditure of federal funds passed through NC Dept. of Health and Human Services on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.</p> <p>b) Destroy in office records of state and private grants 5 years after final financial report is filed.*</p> <p>c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed.</p> <p>d) Destroy in office records not relating to a specific grant or to grants not funded after 1 year.</p> <p><i>Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.</i></p>	<p>Retention: 09 NCAC 03M .0703 2 CFR 200.333</p>
2.28	<p>INVESTMENTS</p> <p>Includes fund information, portfolio listings and reports, balance sheets, exchange or consent instructions, broker confirmations, notices, and other documentation related to agency investments. Also includes transaction schedules for projecting revenue on investments as well as performance investment reports issued by broker or investment firm.</p>	<p>a) Destroy in office transaction schedules after 2 years.*</p> <p>b) Destroy in office performance investment reports when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u></p> <p>c) Destroy in office all remaining records after 3 years.*</p>	<p>Authority: G.S. 159-30</p>

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.29	LOAN RECORDS Records concerning loans received by the agency. Includes documentation of intent to proceed, loan agreements, promissory notes, letters of credit, statements, notices of principal and interest due, and other related records.	Destroy in office 5 years after satisfaction or cancellation of loan.*	
2.30	LOCAL GOVERNMENT COMMISSION FINANCIAL STATEMENTS	Destroy in office after 3 years.*	Authority: G.S. 159-33
2.31	LONGEVITY PAY	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.32	 PAYMENT CARD DATA Records created in association with payment card transactions entered by third parties for the purchase of goods or services from the agency.	Destroy in office after processed.*	Confidentiality: G.S. 132-1.2(2) G.S. 132-1.10(b)(5)

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.33 	PAYROLL AND EARNINGS RECORDS Records containing information such as the name, Social Security number, number of hours worked, compensation rate, deductions, and total wages paid each employee per payroll period. Also includes employer contributions (e.g., retirement, healthcare) along with individual and group employee earnings records and payroll registers showing earnings and deductions for each pay period. SEE ALSO: Payroll Deduction Records (below), Time Sheets, Cards, and Attendance Records (below); for 401(k) and other retirement plan payouts, see Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office 30 years from date of separation records necessary for retirement or similar benefits verification. b) Destroy in office remaining records after 5 years.*	Authority: 29 CFR 516.30(a) Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) 29 CFR 516.5(a) 29 CFR 1627.3(a)


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.34 	PAYROLL DEDUCTION RECORDS Records used to start, modify, or stop all voluntary or required deductions from payroll. Includes tax withholding (NC-4, W-4), retirement and deferred compensation, savings plans, insurance, association dues, orders of garnishment, etc. Used as proof the employee approved of the deduction(s). SEE ALSO: Payroll and Earnings Records (above), Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office tax withholding forms 4 years after termination of deduction.* b) Destroy in office authorizations for deductions for retirement contributions, bank payments, savings plans, insurance, and dues 2 years after termination of deduction. c) Destroy in office remaining records 3 years after termination of deduction.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: IRS Publication 15 29 CFR 516.6(c)(1)
2.35	POWELL BILL RECORDS Records include certified statements, expenditures reports, information sheets, financial statements submitted to the North Carolina Department of Transportation, and all other related records.	Destroy in office after 3 years.	
2.36	PURCHASE ORDERS Records, forms, packing slips, and attached documents concerning purchased supplies, equipment, and services. SEE ALSO: Grants: Financial (above).	Destroy in office after 3 years.* <i>Retention Note: Packing slips may be destroyed upon verification of items received if they are not the only record of the purchase of the item.</i>	
2.37	QUALIFIED PRODUCTS LISTS (QPL) Records identifying products approved for purchase by the agency.	Destroy in office 3 years after superseded or obsolete.*	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.38	<p>REQUISITIONS Requests for payment or to acquire goods or services.</p> <p>SEE ALSO: Inventories (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office after 1 year.*	
2.39	<p>SCHOLARSHIP RECORDS Records concerning scholarships awarded by the agency. Includes applications, award letters, conditions and stipulations, agreements and contracts, disbursement statements, progress reports, and other related records.</p>	<p>a) Destroy in office after 3 years records documenting the awarding of scholarships.</p> <p>b) Destroy in office 1 year after notification of applicant records concerning applications that are denied by the agency or awards that are declined by the recipient.</p>	
2.40	<p>SHIFT PREMIUM PAY Authorizations and other related records concerning employees receiving shift premium pay.</p>	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.41	<p>STATEMENTS OF BACK PAY Forms used to determine the gross pay an employee would have earned during a specified period for back pay in a grievance decision, settlement agreement, or other order.</p>	Destroy in office 3 years after payment.*	


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.42 	TAX FORMS Tax information returns generated by the agency (e.g., 1098, 1099, W-2, W-3) to be reported to the Internal Revenue Service and furnished to the other party to the transaction.	Destroy in office 5 years after submitted to taxpayer and/or IRS.*	Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) IRS Publication 15
2.43	TAX RETURNS Tax returns filed by the agency.	Destroy in office 6 years after filed.*	
2.44	TIME SHEETS, CARDS, AND ATTENDANCE RECORDS Records documenting the work hours and attendance of employees. SEE ALSO: Payroll and Earnings Records (above).	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a) 29 CFR 516.6(a)(1)

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.45	<p>TRAVEL REIMBURSEMENTS</p> <p>Includes requests and authorizations for reimbursement for travel and related expenses.</p> <p>SEE ALSO: Grants: Financial (above), Travel Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.46	<p> VENDORS</p> <p>Files maintained on specific vendors authorized or debarred from doing business with the agency. Includes name and address, correspondence (including e-mail), and other related records.</p>	Destroy in office when superseded or obsolete.	

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STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS

Official records received and created by agency geographic information system programs. See G.S. 132-10 for information about providing public access to GIS databases.

ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.01	GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA Geo-referenced data and metadata to facilitate the management, manipulation, analysis, modeling, representation, and spatial analysis of complex problems regarding planning and management of resources.	Retain in office parcel, boundary, zoning, and orthoimagery layers (with accompanying data sets) permanently. <i>Retention Note: Other datasets should be kept according to standards and procedures set by the North Carolina Geographic Information Coordinating Council. See also GEOSPATIAL RECORDS, page A-13.</i>	
3.02	GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA) Records created during development or modification of an automated system which are necessary to access, retrieve, manipulate, and interpret data in that system; and records that explain the meaning, purpose, structure, local relationships, and origin of the data elements. Includes data element dictionaries, file layout, codebooks and tables, and definition files.	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.03	GEOGRAPHIC INFORMATION SYSTEM (GIS) INTERNAL STANDARDS AND PROCEDURES Includes requirements that are intended to make hardware, software, and data compatible and that cover data capture, accuracy, sources, base categories, output, and data element dictionaries.	Retain in office permanently.	
3.04	GEOGRAPHIC INFORMATION SYSTEM (GIS) MONITORING RECORDS Includes system security, quality assurance, transaction tracking, and other related activity monitoring records.	Destroy in office after 1 year.	
3.05	GEOGRAPHIC INFORMATION SYSTEM (GIS) OPERATIONAL RECORDS Includes user guides, system flowcharts, job or workflow records, system specifications, and similar documentation.	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	
3.06	GEOGRAPHIC INFORMATION SYSTEM (GIS) PROJECT RECORDS	a) Retain in office GIS datasets and accompanying documentation (metadata) with historical and/or legal value permanently. b) Destroy in office remaining items when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.07	<p>LAYERS: ADDRESS POINTS</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.08	<p>LAYERS: CORPORATE LIMITS</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.09	<p>LAYERS: EXTRATERRITORIAL JURISDICTIONS</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.10	<p>LAYERS: ORTHOIMAGERY</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Create a snapshot of dataset when created. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.11	<p>LAYERS: STREET CENTERLINE</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.12	<p>MAPPING PROJECT RECORDS</p> <p>Includes contract maps and all deliverable products for aerial photography, orthophotography, cartographic, cadastral, and digital mapping projects.</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.13	<p>MAPS: PARCEL</p> <p>Maps, including cadastral maps, and surveys of boundaries and measurements of each parcel, and information about encroachments, right-of-ways, and structures.</p> <p>See also GEOSPATIAL RECORDS, page A-13, and Property Management Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>Paper: Destroy in office upon State Archives approval.</p> <p>GIS dataset: Create a snapshot of dataset quarterly. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.14	<p>MAPS: PARKS</p> <p>Includes park boundaries, facilities, landscaping, topography, and other pertinent information. Also includes maps and drawings stored and generated by Geographic Information System (GIS) and computer-aided design (CAD) systems.</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office permanently, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.15	MAPS: ALL OTHER @ Includes field maps, soil, topographic, sales, subdivision plats, right-of-way, sectional, highway, etc. Also includes paper maps.	a) Retain in office maps, including GIS datasets and accompanying documentation (metadata), with historical and/or legal value permanently. b) Destroy in office remaining items when reference value ends.± <i>Retention note: Contact the State Archives of North Carolina before destroying any tax maps, watershed maps, or zoning maps.</i> Agency Policy: Destroy in office after <u>2 years</u>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 4: HUMAN RESOURCES RECORDS**

Official records and materials created and accumulated incidental to the employment, qualifications, training, and pay status of agency employees. Comply with applicable provisions of G.S. 115C Article 21A (LPSUs), G.S. 122C-158 (area authorities), G.S. 130A-45.9 (public health authorities), G.S. 153A-98 (county), G.S. 160A-168 (municipal), G.S. 161E-257.2 (public hospitals), and G.S. 162A-6.1 (water and sewer authorities) regarding confidentiality of personnel records.

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.01	ABOLISHED POSITIONS Records concerning positions that have been abolished.	Destroy in office after 1 year.	
4.02	 ADMINISTRATIVE INVESTIGATIONS Records concerning the investigation of conduct problems among agency personnel. SEE ALSO: Disciplinary Actions (below).	a) Destroy in office after 3 years records concerning complaints against agency personnel that are resolved without an internal investigation. b) Destroy in office after 5 years records concerning complaints lodged against agency personnel that are exonerated. c) Destroy in office 5 years after final disposition or expiration of relevant statute of limitations complaints lodged against agency personnel that are settled out-of-court. d) Transfer investigation reports, disciplinary actions, and other related internal affairs case records to Personnel Records (Official Copy) (below).	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

4: HR


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.03 	APPLICATIONS FOR EMPLOYMENT Records submitted by job applicants for vacant positions or by current employees for promotion, transfer, or training opportunities. Includes applications, transcripts, resumes, letters of reference, and other related records.	a) Transfer applications, resumes, transcripts, and similar records as applicable to Personnel Records (Official Copy) (below) or Seasonal and Contract Worker Records (below). b) Destroy in office after 2 years unsolicited application materials from individuals hired. c) Destroy in office records concerning individuals not hired 2 years after date of receipt, if no charge of discrimination has been filed. If charge has been filed, destroy in office 1 year after resolution of charge.* d) Destroy in office 2 years after receipt unsolicited applications/resumes and those received after posted closing dates.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31
4.04	APPRENTICESHIP PROGRAM RECORDS Records concerning registered apprenticeship programs. Includes applications and selection materials as well as aggregated data. Also includes apprenticeship affirmative action plans.	Destroy in office 5 years after the making of the record or the personnel action involved, whichever occurs later.	Authority: 29 CFR 30.4(a) 29 CFR 1602.20 Retention: 29 CFR 30.12(d) 29 CFR 1602.21


4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.05 	APTITUDE AND SKILLS TESTING RECORDS Records concerning aptitude and skills tests required of job applicants or of current employees to qualify for promotion or transfer. Includes civil service examinations. SEE ALSO: Employment Selection Records (below).	Destroy in office after 2 years.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)(iv)
4.06	ASBESTOS TRAINING Records concerning training programs about the proper management of asbestos. SEE ALSO: Bloodborne Pathogen Training (below), Hazardous Materials Training Records (below).	a) Destroy in office employee-specific records 1 year after separation. b) Destroy in office remaining records when superseded or obsolete.	Retention: 29 CFR 1910.1001(m)(4)

4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.07	<p>BENEFITS RECORDS</p> <p>Records concerning life, health, accident, and disability insurance plans as well as seniority and merit systems. Includes records concerning systems in which employees can select fringe benefits from a cafeteria plan, including flexible spending plans. File also includes notifications, election and claim forms, rejection letters, and other records related to COBRA (Consolidated Omnibus Budget Reconciliation Act).</p>	<p>a) Destroy in office approved claims forms after 2 years.*</p> <p>b) Destroy in office rejected requests 6 months after decision.</p> <p>c) Destroy in office 3 years after employee returns or eligibility expires notifications to employees or dependents informing them of their rights to continue insurance coverage after termination or during disability or family leave.</p> <p>d) Destroy in office remaining records 1 year after plan is terminated.</p>	Retention: 29 CFR 1627.3(b)(2)
4.08	<p>BLOODBORNE PATHOGEN TRAINING</p> <p>Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors.</p> <p>SEE ALSO: Asbestos Training (above), Hazardous Materials Training Records (below).</p>	Destroy in office after 3 years.	Retention: 29 CFR 1910.1030(h)(2)(ii)
4.09	<p>DIRECTORIES, ROSTERS, OR INDICES</p> <p>Includes records listing employees, their job titles, work locations, phone numbers, e-mail addresses, and similar information.</p>	Destroy in office when superseded or obsolete.	

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.10	<p>DISABILITY SALARY CONTINUATION CLAIMS</p> <p>Forms used by disabled employees to apply for salary continuation benefits. Also include short-term disability claims forms and other related records.</p>	<p>a) Transfer original forms to Local Government Employees' Retirement System (LGERS) or Teachers' and State Employees' Retirement System (TSERS) for action when received.</p> <p>b) Destroy in office remaining records after 3 years.</p>	
4.11	<p>DISCIPLINARY ACTIONS</p> <p>Correspondence (including e-mail) and other records concerning disciplinary actions taken against employees by personnel or supervisory staff, including records documenting terminations. Includes records created by civil service boards when considering, or reconsidering on appeal, an adverse action against an employee.</p>	<p>a) Transfer records as applicable to Personnel Records (Official Copy) (below).</p> <p>b) Destroy in office all remaining records 2 years after resolution of all actions.</p>	<p>Authority: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p> <p>Retention: 29 CFR 1602.31</p> <p>Subject to the public information provision delineated in the above authorities.</p>

4: HR



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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.12	<p>DUAL EMPLOYMENT</p> <p>Records concerning employees' requests and authorizations to accept employment with another local government agency.</p> <p>SEE ALSO: Secondary Employment (below).</p>	<p>a) Destroy in office approved requests and related records 1 year after employee terminates additional employment.</p> <p>b) Destroy in office denied requests and related records after 6 months.</p>	
4.13	<p> EDUCATIONAL LEAVE AND REIMBURSEMENT</p> <p>Includes records requesting educational leave and tuition assistance, reimbursements, and other related records.</p> <p>SEE ALSO: Leave Records (below).</p>	<p>a) Transfer records documenting approved leave requests to Personnel Records (Official Copy) (below).</p> <p>b) Destroy in office records concerning denied requests 6 months after denial.*</p> <p>c) Destroy in office records concerning approved tuition reimbursements 3 years after reimbursement.*</p>	<p>Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p>
4.14	<p> EMPLOYEE ASSISTANCE PROGRAMS</p> <p>Records documenting assistance and counseling opportunities. Includes requests for information, referrals, forms, releases, correspondence, and other related records.</p>	<p>Destroy in office after 3 years.</p>	<p>Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p>



4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.15 	EMPLOYMENT ELIGIBILITY RECORDS Includes the I-9 forms, employment authorization documents filed with the U.S. Department of Labor, petitions filed by the agency, E-Verify documentation, and Selective Service Registration compliance forms.	a) I-9 forms have mandatory retention throughout the duration of an individual's employment. After separation, destroy records in office 3 years from date of hire or 1 year from separation, whichever occurs later. b) Destroy in office after 5 years employment authorization documents filed with the U.S. Department of Labor. c) Destroy in office immigrant or nonimmigrant petitions filed by the agency 3 years after employee separation. d) Destroy in office remaining records 1 year after employee separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 8 USC 1324a(b)(3)
4.16 	EMPLOYMENT SELECTION RECORDS Records concerning the selection of applicants for vacant positions or of current employees for promotion, transfer, or training opportunities. Includes interview documentation, rosters, eligibility lists, test ranking sheets, justification statements, background and criminal history checks, and similar records. SEE ALSO: Applications for Employment (above), Aptitude and Skills Testing Records (above).	a) Destroy in office background and criminal history checks after 5 years. b) Destroy in office remaining records 2 years after hiring decision.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)

4: HR



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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.17 	EXIT INTERVIEW RECORDS Includes feedback from employees planning to separate from the agency.	Destroy in office after 1 year.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.18 	FAMILY MEDICAL LEAVE ACT (FMLA) RECORDS Records concerning leave taken, premium payments, employer notice, medical examinations considered in connection with personnel action, disputes with employees over FMLA, and other related records. SEE ALSO: Leave Records (below).	Destroy in office 3 years after leave ends.*	Authority: 29 CFR 825.110 Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 825.500(b)


4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.19 	GRIEVANCES Includes initial complaint by employee, investigation, action, summary, and disposition. SEE ALSO: Disciplinary Actions (above), Personnel Records (Official Copy) (below).	Destroy in office after 2 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.20	HAZARDOUS MATERIALS TRAINING RECORDS Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors. May also include documentation of loans of radioactive materials for the purpose of training exercises. SEE ALSO: Asbestos Training (above), Bloodborne Pathogen Training (above).	Destroy in office after 5 years.	Authority: 29 CFR 1910.120(p)(8)(iii) 10A NCAC 15
4.21	INTERNSHIP PROGRAM Records concerning interns and students who work for the agency.	Destroy in office after 2 years.	
4.22	LAW ENFORCEMENT TRAINING Records concerning internal training for law enforcement personnel.	Retain in office permanently.	



4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.23 	LEAVE RECORDS Records concerning employee leave, including requests for and approval of sick, vacation, overtime, buy-back, shared, donated, etc. Also includes records documenting leave without pay. SEE ALSO: Educational Leave and Reimbursement (above), Family Medical Leave Act (FMLA) Records (above), Military Leave (below).	a) Destroy in office approved requests 3 years after return or separation of employee.* b) Destroy in office denied requests after 6 months.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.24 	MEDICAL RECORDS Records for employees, contractors, and volunteers concerning asbestos, toxic substances, and bloodborne pathogen exposure; physical examinations required by the employer in connection with any personnel action, including health or physical examination reports, or certificates created in accordance with the Americans with Disabilities Act (ADA); and records of injury or illness. (Does not include worker's compensation or health insurance claim records.) SEE ALSO: Benefits Records (above), Workers' Compensation Program Claims (below).	a) Destroy in office exposure records 30 years after date of exposure.* b) Destroy in office records pertaining to first-aid job-related illness and injury after 5 years. c) Provide medical records to employees who have worked for less than 1 year at time of separation. d) Destroy in office after 1 year records concerning physical examinations or health certificates. e) Destroy in office remaining records 30 years after employee separation. <i>Retention Note: Records must be maintained separately from an employee's personnel jacket. If part of a worker's compensation claim, follow disposition for Workers' Compensation Program Claims (below).</i>	Authority: 29 CFR 1910.1020(e) Confidentiality: 29 CFR 1630.14(c)(1) 29 CFR 1910.1030(h)(1)(iii) Retention: 29 CFR 1627.3(b)(1)(v) 29 CFR 1910.1020(d) 42 USC 12112(d)(3)


4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.25	<p>MILITARY LEAVE Records concerning military leave, as established by the Uniformed Services Employment and Reemployment Rights Act (USERRA).</p> <p>SEE ALSO: Leave Records (above).</p>	Destroy in office 3 years after leave ends or employee separates from agency.*	Authority: 5 CFR 1208
4.26	<p> PERFORMANCE REVIEWS Information used to establish employees' goals and primary tasks. Records used to evaluate each employee's work performance.</p> <p>SEE ALSO: Personnel Records (Official Copy) (below).</p>	Destroy in office after 3 years.	Confidentiality (applies only to performance evaluations): G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 60A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.27	<p>PERSONNEL ACTION NOTICES Records used to create or change information in the personnel records of individual employees concerning such issues as hiring, termination, transfer, pay grade, and position or job title.</p>	Transfer records to Personnel Records (Official Copy) (below).	Subject to the public information provision delineated in relevant General Statutes.

4: HR



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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.28 	PERSONNEL RECORDS (OFFICIAL COPY) Official copy of personnel file maintained on each permanent and temporary agency employee that is eligible for benefits. Includes basic employee information and records and forms relating to the selection or non-selection, promotion, transfer, leave, salary, suspension, and termination of employment. Note: For agencies responsible for maintaining personnel files for criminal justice officers, please consult 12 NCAC 09C .0307 for the mandatory records of certification that must be housed in the personnel file. SEE ALSO: Medical Records (above), Seasonal and Contract Worker Records (below).	a) Destroy in office after 30 years from date of separation information needed to document: date and amount of each increase or decrease in salary with that agency; date and type of each promotion, demotion, transfer, suspension, separation, or other change in position classification with that agency; date and general description of the reasons for each promotion with that agency; date and type of each dismissal, suspension, or demotion for disciplinary reasons taken by the agency; and, if the disciplinary action was a dismissal, a copy of the written notice of the final decision of the agency setting forth the specific acts or omissions that are the basis of the dismissal. b) Destroy in office information necessary to verify benefits 30 years after date of separation. c) Destroy in office remaining records when individual retention periods are reached as noted in individual items in this Records Retention and Disposition Schedule.	Authority/ Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.29 	PERSONNEL RECORDS (SUPERVISOR COPY) Personnel jacket that is often maintained by supervisors.	a) Transfer records as applicable to Personnel Records (Official Copy) (above). b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u>	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.30	<p>POLICIES AND PROCEDURES (PERSONNEL) Official internal agency personnel policies and procedures. Also includes agreements and authorizations required of employees, orientation materials, and informational data.</p> <p>SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), and Workers' Compensation Program Administration (below).</p>	<p>a) Retain in office internal agency personnel policies and procedures permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
4.31	 <p>POLYGRAPH RECORDS Includes statements informing employee of the time, place, and reasons for the test; copy of notice sent to examiner identifying employee to be tested; and copies of opinions, reports, or similar records generated by the examiner and provided to the agency.</p>	<p>Destroy in office 3 years from the date the test was given, or from the date the test was requested if no examination was given.</p>	<p>Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p> <p>Retention: 29 CFR 801.30</p>

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.32	<p>POSITION CLASSIFICATION, CONTROL, AND HISTORY Records concerning personnel actions and position control, status of each established permanent, temporary full-time, or part-time position, and other related topics. Also includes listings providing classification, titles, and position numbers.</p> <p>SEE ALSO: Position Descriptions (below).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
4.33	<p>POSITION DESCRIPTIONS Includes information on job title, grade, duties, agency assigned, and responsibilities.</p>	Destroy in office 2 years after superseded.	Retention: 29 CFR 1620.32
4.34	<p>POSITION EVALUATIONS Forms used to evaluate the primary purpose of a position.</p>	Destroy in office after 1 year.	
4.35	<p>RECRUITMENT RECORDS Includes ads and notices of overtime, promotion, and training. Also includes employment listings.</p>	Destroy in office 1 year from date of record.	Retention: 29 CFR 1627.3(b)


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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.36	<p>RETIREMENT RECORDS</p> <p>Includes descriptive information about retirement systems along with plans and related records outlining the terms of employee pension and other deferred compensation plans, including 401(k).</p> <p>SEE ALSO: Payroll and Earnings Records; Payroll Deduction Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	<p>a) Destroy in office descriptive information about retirement plans 1 year after plan is terminated.</p> <p>b) Destroy in office records concerning employer-sponsored retirement plans 7 years after payment.*</p> <p>c) Transfer Local Governmental Employees' Retirement System (LGRS) forms to Department of State Treasurer.</p> <p>d) Transfer applicable records to Personnel Records (Official Copy) (above).</p>	Retention: 29 CFR 1627.3(b)(2)
4.37	<p> SEASONAL AND CONTRACT WORKER RECORDS</p> <p>Records concerning seasonal or contractual employees who are not provided with or eligible for benefits.</p> <p>SEE ALSO: Personnel Records (Official Copy) (above).</p>	Destroy in office 5 years after date of separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.38	<p>SECONDARY EMPLOYMENT</p> <p>Records concerning employees' requests and authorizations to accept employment with a private entity.</p> <p>SEE ALSO: Dual Employment (above.)</p>	<p>a) Destroy in office approved requests and related records 1 year after employee terminates outside employment.</p> <p>b) Destroy in office denied requests and related records after 6 months.</p>	

4: HR

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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.39	<p>SERVICE AWARDS AND COMMENDATIONS Includes award and selection committee reports, nominations, selection criteria, and similar administrative records relating to employee recognition or incentive programs.</p> <p>SEE ALSO: Personnel Records (Official Copy) (above).</p>	Destroy in office 2 years from date of record creation or the personnel action involved.	
4.40	<p>SUGGESTIONS AND SURVEYS Recommendations and feedback submitted by agency employees.</p>	Destroy in office after 1 year.	
4.41	<p>TRAINING AND EDUCATIONAL RECORDS Records concerning the delivery of training to agency personnel. Includes training manuals, syllabi and course outlines, and other related records. Also includes employee-specific records (certificates, transcripts, test scores, etc.) relating to the training, testing, or continuing education of employees.</p> <p>SEE ALSO: Conferences and Workshops (STANDARD 7: PUBLIC RELATIONS RECORDS), Educational Leave and Reimbursement (above). Other required trainings are handled in Asbestos Training (above), Bloodborne Pathogen Training (above), Hazardous Materials Training Records (above), Law Enforcement Training (above).</p>	<p>a) Transfer records as applicable to Personnel Records (Official Copy) (above), if such training and testing is required for the position held or could affect career advancement.</p> <p>b) Destroy in office certifications and other qualifications 5 years after expiration or employee separation.</p> <p>c) Destroy in office general training materials when superseded or obsolete.</p> <p>d) Destroy in office remaining employee-specific records after 1 year.</p>	Retention: 29 CFR 1627.3(b)(1)(iv)


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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.42 	UNEMPLOYMENT COMPENSATION CLAIMS Claim forms and other related records concerning unemployment compensation cases.	Destroy in office after 5 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a)
4.43	UNEMPLOYMENT COMPENSATION REPORTS Quarterly reports showing month-to-date wages, month-to-date compensation, year-to-date wages, and year-to-date compensation for each employee. May be filed with NC Division of Employment Security.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
4.44	UNEMPLOYMENT INSURANCE Forms submitted to the Department of Commerce to report wage records of terminated employees.	Transfer to the N.C. Department of Commerce, Division of Employment Security.	
4.45	VERIFICATION OF EMPLOYMENT RECORDS Inquiries and responses concerning verification of an employee's prior or current employment with the agency.	Destroy in office after 1 year.	
4.46	VOLUNTEER RECORDS Records concerning individuals who volunteer to assist with various agency activities.	Destroy in office 2 years after completion of assignment.	


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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.47	WORK SCHEDULES AND ASSIGNMENTS Records concerning work, duty, shift, crew, or case schedules, rosters, or assignments.	Destroy in office after 1 year.	
4.48	WORKERS' COMPENSATION PROGRAM ADMINISTRATION Includes program policies, guidelines, and related administrative documentation.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.49	 WORKERS' COMPENSATION PROGRAM CLAIMS Records concerning workers' compensation claims filed by employees' supervisors concerning accidental injuries or illnesses suffered on the job. Includes Employer's Report of Injury to Employee (Form 19), accident investigation reports, medical reports, claim cost reports, reference copies of medical invoices, and other related records. <i>Note: All official copies of claims records should be transferred to the North Carolina Industrial Commission in compliance with G.S. 97-92(a).</i>	Destroy in office agency's working file for workers' compensation claims by its employees 5 years after employee returns to work or separates from agency.*	Confidentiality: G.S. 8-53 G.S. 97-92(b)

4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 5: INFORMATION TECHNOLOGY (IT) RECORDS**

Information technology encompasses all activities undertaken by agency to design, develop, and operate electronic information systems. This section covers records for which Information Technology personnel are responsible, including administrative records and those used to process data and monitor and control operations.

Note: Administration, use, and retention of records concerning computer and information security should comply with applicable provisions of G.S. 132-6.1 on the confidentiality of records regarding "hardware or software security, passwords, or security standards, procedures, processes, configurations, software, and codes." (G.S. 132-6.1 (c))


ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.01 	AUDITS: IT SYSTEMS Records documenting user actions affecting the contents of monitored systems. Also includes fixity checks and other periodic tests of data validity.	a) Destroy in office 1 year after superseded or obsolete fixity check documentation. b) Destroy in office remaining records after disposition of record.*	Confidentiality: G.S. 132-6.1(c)
5.02	COMPUTER AND NETWORK USAGE RECORDS Records documenting usage of electronic devices and networks. Includes login files, system usage files, individual program usage files, and records of use of the Internet by employees.	Destroy in office after 1 year.	
5.03	DATA DOCUMENTATION RECORDS Records concerning data in automated systems. Includes data element dictionary, file layout, code book or table, entity relationships tables, and other records related to the structure, management, and organization of data.	Destroy in office 3 years after system is discontinued and/or replaced.	

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.04	<p>DATA MIGRATION RECORDS Technical records documenting data migrations.</p> <p><i>Note: The data itself is subject to the disposition instructions indicated for its relevant records series; these are merely records about migrating said data.</i></p>	Destroy in office 1 year after completion of data migration.	
5.05	<p>DATA WAREHOUSES Federated data gathered by the agency from other sources for the purposes of comparison and distribution.</p> <p>SEE ALSO: Collected Data (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office when superseded or obsolete.	Maintain confidentiality consistent with any restrictions placed on the data provider.
5.06	<p>DIGITIZATION AND SCANNING RECORDS Records concerning data entry and imaging operations. Includes quality control records.</p> <p>See also REQUEST FOR DISPOSAL OF ORIGINAL RECORDS DUPLICATED BY ELECTRONIC MEANS, page A-21.</p>	<p>Destroy in office 10 days after digitization.</p> <p><i>Note: The digital surrogate becomes the record copy and must be retained according to the disposition instructions for that record type.</i></p>	
5.07	<p> ELECTRONIC RECORDS POLICIES AND PROCEDURES Includes procedural manuals as well as an Electronic Records and Imaging Policy and a Security Backup Policy.</p>	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.7(b) G.S. 132-6.1(c)

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.08	INFORMATION TECHNOLOGY ASSISTANCE RECORDS Records documenting troubleshooting and problem-solving assistance provided by agency information systems personnel to users of the systems. Includes help desk assistance requests, resolution records, and related documentation.	Destroy in office 1 year after work is completed.	
5.09 	NETWORK AND SYSTEM SECURITY RECORDS Records documenting cybersecurity efforts. Includes records concerning firewalls, anti-virus programs, intruder scanning logs, and other related records.	a) Destroy in office finalized cyber incident reports 5 years after resolution. b) Destroy in office after 2 years records documenting incidents involving unauthorized attempted entry or probes on data processing systems, IT systems, telecommunications networks, and electronic security systems. c) Destroy in office after 1 year records concerning firewalls, anti-virus programs, and other related records.	Confidentiality: G.S. 132-6.1(c)
5.10 	NETWORK DIAGRAMS Records documenting the logical and physical relationships of network components for purposes of organization, deployment, troubleshooting, monitoring of access, and management of day-to-day operations.	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-6.1(c)


5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.11	<p>PROJECT DOCUMENTATION</p> <p>Records created to design, develop, control, or monitor a specific project or group of IT projects. Includes statements of work, assessments, maintenance agreements, and testing records.</p> <p>SEE ALSO: Projects (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office permanently records with historical value.</p> <p>b) Destroy in office remaining records 3 years after completion of project.</p>	
5.12	<p>SOFTWARE LICENSE AND COPYRIGHT PROVISIONS RECORDS</p> <p>Records documenting compliance with agency software license and copyright provisions. Includes software licenses, correspondence (including e-mail), and related documentation.</p>	Destroy in office 1 year after software is superseded or obsolete.	
5.13	<p>SYSTEM ACCESS RECORDS</p> <p>Records documenting access requests and authorizations, system access logs, and other related records.</p>	Destroy in office 1 year after superseded or obsolete.	
5.14	<p> SYSTEM DOCUMENTATION RECORDS</p> <p>Records documenting operating systems, application programs, structure and form of datasets, system structure, and system-to-system communication. Includes system overviews, dataset inventories, server name, IP address, purpose of the system, vendor-supplied documentation, installed software, and current source code.</p>	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.1(g) G.S. 132-6.1(c)

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.15	<p>SYSTEM MAINTENANCE RECORDS: HARDWARE REPAIR OR SERVICE</p> <p>Records documenting inspections, maintenance, and repairs of agency computer systems that are owned or leased. Includes computer equipment inventories and service records.</p> <p>SEE ALSO: Equipment and Vehicle Maintenance, Repair, and Inspection Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy in office records documenting routine inspections and maintenance of equipment after 1 year.</p> <p>b) Destroy records documenting all other equipment maintenance and repairs upon the final disposition of the equipment.</p>	
5.16	<p>SYSTEM MAINTENANCE RECORDS: RECORDS BACKUPS</p> <p>Records documenting regular or essential system backups. Includes backup tape inventories, relevant correspondence (including e-mail), and related documentation.</p> <p>See also Security Backup Files as Public Records in North Carolina: Guidelines for the Recycling, Destruction, Erasure, and Re-use of Security Backup Files, available on the State Archives of North Carolina website.</p>	<p>Destroy in office in accordance with your office's established, regular backup plan and procedures.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	
5.17	<p>TECHNICAL PROGRAM DOCUMENTATION</p> <p>Records concerning program code, program flowcharts, program maintenance logs, systems change notices, and other related records that document modifications to computer programs.</p>	<p>Destroy in office 1 year after superseded or obsolete.</p>	

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.18	VOICE OVER INTERNET PROTOCOL (VoIP) RECORDS Records concerning line registrations, calls logs, and voicemail records.	a) Destroy in office records concerning line registration when superseded or obsolete. b) Destroy in office call logs after 1 year. c) Destroy in office voicemail records after 30 days.	
5.19	WEB MANAGEMENT AND OPERATIONS RECORDS: STRUCTURE Site maps that show the directory structure into which content pages are organized, and commercial, off-the-shelf software configuration or content management system files used to operate the site and establish its look and feel. Includes server environment configuration specifications. SEE ALSO: Website (Electronic) (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office when superseded or obsolete.	

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 6: LEGAL RECORDS**

Official documentation created or accumulated to substantiate the rights, obligations, or interests of the agency or their individual employees or clients. Please note the confidentiality that G.S. 132-1.1(a) confers to communications by legal counsel expires three years after receipt of such communication.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.01	<p>AFFIDAVITS OF PUBLICATION Proof of publication provided by newspapers regarding publication of ordinances, public hearings, bid solicitations, payment of bills, public sales, etc.</p> <p>SEE ALSO: Public Bodies: Meeting Notices (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office permanently if record provides sole evidence of publication.</p> <p>b) Destroy in office remaining records after 3 years.*</p>	Authority: G.S. 1-600
6.02	<p>ANNEXATION RECORDS Records concerning annexation of property into the city. Includes petitions, reports, correspondence (including e-mail), maps, ordinances, and public hearings.</p>	<p>a) Destroy in office withdrawn petitions after 1 year.</p> <p>b) Retain remaining records in office permanently.</p> <p><i>Retention Note: Annexation maps and ordinances must be filed with the County Register of Deeds office and the office of the Secretary of State (G.S. 160A-29, G.S. 160A-58.61 and G.S. 160A-58.90). A map must also be filed with the county board of elections (G.S. 163-288.1).</i></p>	
6.03	<p>AUTHENTICATIONS Certificates of authentication issued by the agency.</p>	Retain in office permanently.	

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.04	<p>CIVIL RIGHTS CASE RECORDS Records concerning discrimination complaints by employees or former employees and employee requests for reasonable accommodation. Includes equal opportunity (EO) complaints.</p> <p>SEE ALSO: Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Personnel Records (Official Copy) (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Destroy in office requests for reasonable accommodation 2 years after they become obsolete.</p> <p>b) Destroy in office discrimination complaints 1 year after final disposition of the charge or the action.*</p> <p><i>Retention Note: 29 CFR 1602.14 defines final disposition of the charge or the action as "the date of expiration of the statutory period within which the aggrieved person may bring an action in a U.S. District Court or, where an action is brought against an employer either by the aggrieved person, the Commission, or by the Attorney General, the date on which such litigation is terminated."</i></p>	<p>Retention: 29 CFR 1602.14 29 CFR 1602.31</p>

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.05	<p>CIVIL RIGHTS RECORDS</p> <p>Records concerning documentation of personnel policies and procedures to comply with the Age Discrimination in Employment Act (ADEA), the Americans with Disabilities Act (ADA), the Equal Pay Act, the Genetic Information Nondiscrimination Act (GINA), Section 504 of the 1973 Rehabilitation Act, and the 1964 Civil Rights Act. Includes reports required by the Equal Employment Opportunity (EEO) Commission and affirmative action plans.</p> <p>SEE ALSO: Civil Rights Case Records (above), Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	Destroy in office 3 years after superseded or obsolete.	<p>Authority: 29 CFR 1602.1 29 CFR 1602.7 29 CFR 1608.4</p> <p>Retention: 29 CFR 1602.30 29 CFR 1602.32 34 CFR 104.6(c)(2)</p>
6.06	<p>CONDEMNATION RECORDS</p> <p>Settled and pending condemnation cases.</p> <p>SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records.</p>	Retain in office permanently.	

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.07	<p>CONFLICT OF INTEREST AND CONFLICT OF COMMITMENT DISCLOSURE STATEMENTS</p> <p>Completed by the elected agency officials as well as designated staff members in order to disclose an official's status or ownership interests.</p>	Destroy in office 1 year after completion of term or separation.	
6.08	<p>CONTRACTS, LEASES, AND AGREEMENTS @</p> <p>Contracts and agreements for construction, equipment, property, supplies, special programs, and projects. Includes franchise agreements, hold harmless agreements, good faith effort documentation, contractor compliance monitoring, leases, and memoranda of understanding.</p> <p>SEE ALSO: Software License and Copyright Provisions Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Retain in office contracts and agreements with historical value permanently.</p> <p>b) Destroy in office sealed contract records 10 years after expiration of contract.*</p> <p>c) Destroy in office all records related to capital improvement contracts and business associate agreements 6 years after completion, termination, or expiration.*</p> <p>d) Destroy in office records documenting restrictions and compliance with license and copyright provisions for products and services purchased by the agency 1 year after superseded or obsolete.*</p> <p>e) Destroy in office all other contracts and agreements 3 years after completion, termination, or expiration.*</p>	<p>Retention: G.S. 1-47(2) G.S. 1-50(a)(5) 45 CFR 164.316 G.S. 1-52</p>
6.09	<p>DECLARATORY RULINGS</p> <p>Records concerning declaratory rulings issued by the agency to interpret statutes or rules as applied to a specified set of facts.</p>	Retain in office permanently.	

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES





ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.10	<p>DELEGATION OF AUTHORITY RECORDS Records documenting delegations of power to authorize agency business. Includes signature authorities and powers of attorney.</p>	Destroy in office 1 year after superseded or obsolete.	
6.11	<p>EASEMENTS AND RIGHT-OF-WAY AGREEMENTS Granted to the agency.</p> <p>SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records; LOCAL PROGRAM SCHEDULE, Excavation Permits and Right-of-Way Acquisition Working Records (STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS).</p>	Destroy in office 10 years after expiration of agreement.	
6.12	<p>ENCROACHMENTS Records concerning agreements granted by or to the agency. Also includes maps or drawings detailing construction plans attached to agreements.</p>	<p>a) Retain in office permanently records concerning agreements granted by outside entities to the agency.</p> <p>b) Destroy in office when superseded or obsolete records concerning agreements granted to utilities, businesses, and private residents to encroach upon agency property.</p>	
6.13	<p>EXPUNCTIONS Expunction orders received by local agencies.</p>	Destroy in office when record is expunged.	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.14	INVESTIGATION AND HEARING RECORDS Records concerning complaints, fraud allegations, contestments, grievances, and inquiries against individuals and other entities. Includes summaries, charges, reports, assessments and findings, hearing transcripts and evidence, decisions and sanctions, referrals, correspondence, and other related records.	Destroy in office 3 years after completion.*	
6.15	LAND OWNERSHIP RECORDS Includes deeds and titles.	Destroy in office 1 year after agency relinquishes ownership of land.*	
6.16	 LEGAL CORRESPONDENCE Correspondence (including e-mail) and related records concerning legal matters not related to specific legal cases or official opinions.	Destroy in office after 5 years. For information on handling e-mail, see ELECTRONIC RECORDS , page A-11.	Confidentiality: G.S. 132-1.1(a)
6.17	LEGAL OPINIONS Formal legal opinions written by counsel in response to requests concerning the governance and administration of the agency.	Retain in office permanently.	
6.18	 LEGAL REVIEW RECORDS Includes legal reviews of by-laws and charges to boards and commissions, conflicts of interest, and all other agency matters as requested. SEE ALSO: Legal Opinions (above).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a)


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.19 	LITIGATION CASE RECORDS Civil suits to which the agency is a party. Includes affidavits, agreements, appeals, bills, briefs, citations, commitments, complaints, discharges, motions, notices, pleas, releases, statements, testimony, verdicts, waivers, warrants, and writs.	a) Retain in office cases having precedential or historical value permanently. b) Destroy in office adjudicated cases 6 years after final disposition. c) Destroy in office non-adjudicated cases (out-of-court claims) 6 years after final disposition or expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a) G.S. 132-1.9
6.20	OATHS OF OFFICE SEE ALSO: Public Bodies: Member Files (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Transfer official copy of oath of office to the municipal clerk or the county clerk to the board of commissioners or the clerk of the governing board for permanent retention. <i>Retention Note: The Clerk should present a copy of the oaths of elected officials to the Clerk of Superior Court for recording.</i>	Authority: G.S. 105-349 G.S. 153A-26 G.S. 160A-61 G.S. 160A-68 G.S. 160A-284 Retention: G.S. 7A-103(2)
6.21	PERMISSIONS Records conferring legal permission. Includes copyright permission requests and requests for permission to publish intellectual property or holdings of the agency. Also includes copyrights, patents, and trademarks held by the agency.	a) Retain in office permanently records conferring perpetual legal permission as well as records documenting copyrights, patents, and trademarks held by the agency. b) Destroy in office 3 years after expiration records concerning one-time copyright permissions granted by the agency.	

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.22	PRE-TRIAL RELEASE PROGRAM RECORDS Records documenting supervision for defendants who do not pose a risk to the community as they await trial.	Destroy in office 3 years after trial.	
6.23	RELEASE FORMS Records documenting consent and waiving the individual's right to hold the agency responsible for injuries or damages occurring while voluntarily participating in events or activities.	Destroy in office 5 years after termination of release/waiver.	
6.24	SETTLEMENTS Records concerning pre-litigation or informal settlements.	Destroy in office 10 years after expiration.	Authority: G.S. 132-1.3
6.25	VEHICLE TITLES Titles of agency owned vehicles.	Dispose of in accordance with Division of Motor Vehicles procedures for title transfer upon disposition of vehicle.	Authority: G.S. 20-72

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 7: PUBLIC RELATIONS RECORDS**

Official records and materials created and accumulated by internal public relations programs operated by the agency.

ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.01	<p>AGENCY PUBLICATIONS</p> <p>Publications created at agency expense. Also includes correspondence and other related records regarding the design and creation of agency publications.</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy publications management records after 5 years.</p> <p>c) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	
7.02	<p>AUDIO-VISUAL RECORDINGS @</p> <p>Recordings (including digital) and films produced by or for the agency. This does not include recordings of public meetings or security videos.</p> <p>SEE ALSO: Public Bodies: Audio and Video Recordings of Meetings (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	
7.03	<p>COMMUNITY AWARDS @</p> <p>Records concerning awards by the agency recognizing community contributions.</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

7: PR

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.04	<p>CONFERENCES AND WORKSHOPS @</p> <p>Records concerning conferences and workshops conducted by agency employees. Includes slides, charts, transparencies, handouts, and other related records used in presentations.</p> <p>SEE ALSO: Training and Educational Records (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
7.05	<p>EDUCATIONAL MATERIALS</p> <p>Materials produced for usage by teachers or tour groups. Includes lesson plans, activities, and other related records.</p>	<p>Destroy in office when superseded or obsolete.</p>	
7.06	<p>FUND DRIVE AND EVENT RECORDS</p> <p>Records documenting the promotion and organization of fund drives and other special events in which the agency participated. Includes records concerning solicitations requesting and donations providing money or in-kind donations for agency programs. Also includes invitations, registration materials, agendas, handouts, presentations, and programs.</p> <p>SEE ALSO: Donations and Solicitations (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	

7: PR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.07	INVITATIONS Invitations sent and received concerning agency and external functions.	Destroy in office after event occurs.	
7.08	MEDIA FILE Reference copies of newspaper, magazine, and other media clippings concerning the agency, agency officials, and other topics of interest.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u>	
7.09	POPULAR ANNUAL FINANCE REPORT Comprehensive annual financial report (CAFR)	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
7.10	PUBLIC HEARINGS Includes agendas, minutes, notices, speaker sign-up sheets, and similar documentation. SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office minutes permanently. b) Destroy in office remaining records after 1 year.	

7: PR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.11	PUBLIC RECORDS REQUESTS Formal requests submitted by persons seeking access to agency records along with documentation of agency response.	Destroy in office 2 years after resolution.* <i>Note: These disposition instructions apply only to the request, internal agency records related to searching for and preparing responsive records, and communication of response; the documents that are responsive to public records requests should be handled according to their respective disposition instructions. However, if the agency also retains separate copies of the documents that are responsive to public records requests, they may also be destroyed 2 years after completion of the request.</i>	
7.12	PUBLICITY RECORDS @ Records concerning overall public relations of agency. Includes advertisements, announcements, correspondence (including e-mail), photographic materials, news and press releases, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.*	
7.13	SOCIAL MEDIA SEE ALSO: Website (Electronic) (below).	See APPENDIX (page A-12) for guidance in handling social media.	
7.14	SPEECHES Speeches made by agency officials.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	

7: PR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.15	<p>WEBSITE (ELECTRONIC) Records created and maintained in paper and electronic formats concerning the creation and maintenance of the agency's presence on the World Wide Web. Includes correspondence (including e-mail), procedures, instructions, website designs, HTML/XHTML, or other web-based file formats, and other related records.</p> <p>SEE ALSO: Web Management and Operations Records: Structure (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Capture website annually or whenever a major revision in design and/or content has taken place, whichever occurs first. Retain captured content in office permanently. Can be maintained as website snapshots or via Web crawler.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	

7: PR

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STANDARD 8: RISK MANAGEMENT RECORDS

Official records created and accumulated to manage risks in the agency.


ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.01	ACCIDENT/INCIDENT REPORTS (CUSTOMER AND EMPLOYEE) SEE ALSO: Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Transfer records resulting in workers' compensation to Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS). b) Destroy in office remaining employee claims 3 years after settlement or denial of claim.* c) Destroy in office adult non-employee reports 3 years after settlement or denial of claim.* d) Destroy in office reports that do not result in claims or official action after 3 years. e) Destroy in office reports of minors after minor has reached age of 21.	
8.02	DECLARATIONS AND TERMINATIONS OF STATES OF EMERGENCY	Retain in office permanently.	Authority: G.S. 166A-19.22

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.03 	DISASTER AND EMERGENCY MANAGEMENT PLANS @ Records concerning preparedness, evacuations, and operations in the event of a disaster (natural, accidental, or malicious). Includes background surveys, studies, reports, and records concerning the process of notifying personnel in the event of an emergency. Also includes Continuity of Operations Plans (COOP) and Business Continuity Plans (BCP).	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
8.04	DISASTER RECOVERY Administrative records documenting and recovery efforts for emergencies of a short duration as well as disasters inflicting widespread destruction and having long-term consequences for the agency. Includes documents coordinating activities with federal, state, and local emergency management, incident reports, inventories, and disaster relief allocations.	a) Retain in office permanently records documenting major agency disaster recovery efforts and records evaluating emergency response and efficacy. b) Destroy in office after 3 years records concerning minor or routine agency recovery operations that are managed with minimal disruption to normal operations.	
8.05	EMERGENCY DRILLS AND EQUIPMENT RECORDS Includes test records for fire suppression, defibrillator, respirator fit, and other emergency equipment. Also includes records concerning agency emergency and fire drills.	Destroy in office when superseded or obsolete.	
8.06	EMERGENCY NOTIFICATIONS Notifications and alerts sent to residents by Emergency Management or other agency staff regarding a current emergency.	Destroy in office after 1 year.	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.07	<p>EMPLOYEE SECURITY RECORDS</p> <p>Records concerning the issuance of keys, identification cards, parking assignments, passes, etc., to employees.</p> <p>SEE ALSO: Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office when superseded or obsolete.	
8.08	<p>FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS</p> <p>Records concerning agency safety measures. Includes reports, logs, and other related records documenting inspections of agency facilities.</p>	<p>a) Destroy in office inspection reports after 7 years.</p> <p>b) Destroy in office safety audits after 3 years.</p> <p>c) Destroy in office remaining records when superseded or obsolete.</p>	
8.09	<p>FIXED NUCLEAR FACILITIES PLANS FILE</p> <p>Records concerning emergency plans for county fixed nuclear facilities.</p>	Destroy in office when superseded or obsolete.	
8.10	<p>FUEL OIL STORAGE TANK RECORDS</p>	Destroy in office closure records 3 years after completion of permanent closure.	<p>Authority: 40 CFR 280.34</p> <p>Retention: 40 CFR 280.74</p>

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ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.11	<p>HAZARDOUS MATERIALS MANAGEMENT</p> <p>Records documenting agency efforts to prevent and mitigate exposure to hazardous materials. Includes risk assessments, management plans, and abatement/removal records.</p> <p>SEE ALSO: Safety Data Sheets (below).</p> <p><i>Note: Title 10A of the NC Administrative Code provides guidelines about the records requirements for persons who receive, possess, use, transfer, own or acquire any sources of radiation within the State of North Carolina.</i></p>	<ul style="list-style-type: none"> a) Retain in office permanently records documenting hazardous waste disposal sites on agency property and documenting the use of pathogens and biological toxins (select agents) at the agency. b) Destroy in office asbestos records 1 year after building is demolished. <i>(Note: If building is sold, transfer records to new owner.)</i> c) Destroy in office after 5 years records concerning the receipt, maintenance, and disposal of radioactive materials. d) Destroy in office 3 years after superseded or obsolete records concerning hazard mitigation plans. e) Destroy in office records documenting environmental and hazardous waste remediation projects 5 years after project completion. f) Destroy in office remaining records after 30 years. 	<p>Retention: 29 CFR 1910.1001(j)(3)(ii)</p>

8: Risk Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.12	<p>INSURANCE POLICIES</p> <p>Records concerning automobile, theft, fire, and all other insurance policies purchased by agency. Also includes insurance audits, claims reports, surveys, endorsements, certificates of insurance, and waivers.</p>	<p>a) Destroy in office records concerning automobile and other liability insurance policies 10 years after superseded or obsolete.*</p> <p>b) Destroy in office certificates of insurance after 1 year.</p> <p>c) Destroy in office self-insurer certifications 6 years from date of termination of policy or settlement of all claims.</p> <p>d) Destroy in office remaining records after 1 year after superseded or obsolete.</p>	
8.13	<p>LOSS CONTROL INSPECTION REPORTS</p> <p>Self-inspections to identify potential liabilities or hazards that may exist in agency owned buildings or property.</p>	Destroy in office when superseded or obsolete.	
8.14	<p>LOST, STOLEN, OR DAMAGED PROPERTY REPORTS</p> <p>Includes reports of property lost or stolen at agency. Also includes reports and employee narratives of vandalism to agency property.</p>	Destroy in office after 2 years.*	
8.15	<p>NATIONAL FLOOD INSURANCE PROGRAM RECORDS</p> <p>Records concerning the participation of a local government agency in FEMA's National Flood Insurance Program (NFIP). Includes floodplain management ordinances, maps, and other related records.</p>	<p>a) Retain in office permanently floodplain management ordinances.</p> <p>b) Destroy in office copies of flood insurance rate maps, elevation certificates, and elevation information when superseded or obsolete.</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.16	<p>OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION (OSHA)</p> <p>Records concerning injury or illness, extent and outcomes, summary totals for calendar year, and OSHA forms. Includes ergonomic assessments for employees.</p>	<p>Destroy in office after 5 years.</p>	<p>Retention: 29 CFR 1904.33 29 CFR 1904.44</p>
8.17	<p>SAFETY DATA SHEETS</p> <p>Forms supplied to agencies from manufacturers and distributors of hazardous materials for materials held by the agency.</p>	<p>Destroy in office 30 years after materials have been disposed of according to manufacturer's instructions.</p> <p><i>Retention Note: A data sheet for a mixture may be discarded if the new data sheet includes the same hazardous chemicals as the original formulation. If the formulation is different, both data sheets must be retained for 30 years. Data sheets may also be discarded if some other record identifying the substances used, where they were used, and when they were used is retained the required 30-year period.</i></p>	<p>Retention: 29 CFR 1910.1020(d)(1)(ii)(B)</p>

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 9: WORKFORCE DEVELOPMENT RECORDS**

Official records created and accumulated by the agency to manage workforce development programs. Relevant legislation includes the Comprehensive Employment and Training Act, the Job Training and Partnership Act, the Workforce Investment Act, and the Workforce Innovation and Opportunity Act.

ITEM #	STANDARD 9: WORKFORCE DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
9.01	AUDIT/AUDIT RESOLUTIONS Records concerning reports from financial and compliance audits conducted on Workforce Investment Act programs in accordance with OMB Circular A-133. Includes audit reports and correspondence concerning audits and audit resolutions for the local area. Also includes federal and state audits.	Destroy in office after 3 years.	Authority: OMB Circular A-133 29 CFR 97.26
9.02	LOCAL AREA JOB TRAINING PLAN RECORDS Records concerning the local board's bid process for contracting workforce development programs.	Destroy in office when superseded or obsolete.	Authority: 20 CFR 652.8
9.03	PARTICIPANT RECORDS Records concerning applicants, registrants, eligible applicants/registrants, participants, terminees, and employees who submit requests for services of the Dislocated Workers Program and Workforce Investment Act programs. Includes applications, client history, Employability Development Plans, program referral, monitoring notes, pay authorizations, release forms, and Workforce Investment Act follow-up questionnaires.	Destroy in office 3 years after close of audit/final year expenditure.*	Authority: 20 CFR 652.8

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MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.
-

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.
-

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.
-

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.
-

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-19) can be used for such requests.
-

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
- “Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or characteristics, made or received pursuant to law or ordinance in connection with the

transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (State or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the State or of any county, unit, special district or other political subdivision of government.

Q. Is any person allowed to see my records?

- A.** Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at ± times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. What about my confidential records?

- A.** Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.
-

Q. Am I required to make available to the public copies of drafts that have not been approved?

- A.** Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.
-

Q. What do I do with permanent records?

- A.** Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**” (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.
- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records

available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.

- Adoptions, marriages, and divorces document changes in familial relationships. Though adoptions are confidential (not available for public inspection), they document changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its constituents. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of residents and organizations?
- Do they have a long-term impact on residents and organizations?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.
-

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on page A-22. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. *May I store our unused records in the basement, attic, shed, etc.?*

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. *Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?*

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. *Aren't all our old records at the State Archives of North Carolina?*

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. *I found some really old records. What should I do with them?*

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. *Can I give my old records to the historical society or public library?*

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. *Whom can I call with questions?*

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See Audits: Performance (STANDARD 1: ADMINISTRATIVE AND MANAGEMENT RECORDS) and Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the *General Records Schedule: Local Government Agencies*, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the *General Records Schedule: Local Government Agencies* or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-signatures>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.
-

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. Am I required to tell anyone about the destructions?

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).



Destructions Log

County/Municipality			
Division	Section	Branch	
Location(s) of Records			

Records Series	Required Retention	Date Range	Volume (file drawers or MB)	Media (Paper, Electronic)		Date of Destruction	Method of Destruction	Authorization for Destruction
				P	E			

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

A. E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

A. We do not recommend printing e-mail for preservation purposes. Important metadata is lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

A. The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. *We have an imaging system. Are we required to keep the paper?*

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. *Computer storage is cheap. Can I just keep my computer records permanently?*

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. *What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?*

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years (see Leave Records, STANDARD 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:

- Parcel data
- Street centerline data
- Corporate limits data
- Extraterritorial jurisdiction data
- Zoning data, address points
- Orthophotography (imagery)
- Utilities
- Emergency/E-911 themes

For more information, see **STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS.**

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

Q. *Who should be responsible for creation and long-term storage of archived data?*

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. *Can I obtain digital copies of the security preservation records?*

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

A. We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:

- Managing public records in North Carolina
- Disaster preparedness and recovery
- Confidentiality
- Organizing paper and digital files
- Digital communications

Q. Will you design a workshop especially for our office?

A. Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

A. No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public. To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

A. Not at this time.

Q. Are the workshops available in an online format?

A. We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

Add a new item

Delete an existing item

Change a retention period

Standard Number _____ Page _____ Item Number _____

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

In accordance with the provisions of N.C. Gen. Stat. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature Title Date

Approved by:

Signature Requestor's Supervisor Date

Concurred by:

Signature Assistant Records Administrator State Archives of North Carolina Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name: Date (MM-DD-YYYY):
Phone (area code): Email:
County/Municipality: Office:
Mailing address:

Table with 5 columns: Records Series Title, Description of Records, Inclusive Dates, Approx. Volume of Records, Retention Period.

Requested by: Signature Title Date

Approved by: Signature Requestor's Supervisor Date

Concurred by: Signature Assistant Records Administrator State Archives of North Carolina Date



File Plan

County/Municipality			
Division	Section	Branch	

Records Series	Records Creator	Records Owner (if record copy is transferred within the agency)	Media (Paper, Electronic, Scanned)			Required Retention	Location(s) of Records
			P	E	S		



Related Records Series Found in Local Agency Program Schedules

In some limited cases, records series with similar names and/or functions that are created and maintained by local government entities have not been superseded by the *General Records Schedule: Local Government Agencies*. These records series are described as unique records series in one of the local program retention schedules issued separately by DNCR for use by specific local agencies. This duplication occurs when records with similar names and/or functions have different retention guidance due to statutory, legal, evidentiary, or fiscal requirements. An example of this is the accounts receivable records series. In the *General Records Schedule*, the Accounts Receivable records series has a disposition instruction of “Destroy in office 3 years after collection.” In the *Local Health Departments Schedule*, the Accounts Receivable: Clinical Services records series also includes the disposition instruction, “Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.” In both cases, the records series documents the money received by the local agency, however, the retention requirements for the Accounts Receivable: Clinical Services differ due to specific retention requirements concerning the management and dispersal of grant funds.

The purpose of this table is to provide a source for determining if the general records series item listed in the *General Records Schedule: Local Government Agencies* covers the function and/or retention requirements associated with the records created by your agency or if a specific program schedule applies. This table provides pointers to the relevant records series that can be found in one or more of the local agency program schedules.

Here’s how to use the table:

- The records series found in the left-most column are listed and described in the *General Records Schedule: Local Government Agencies* and appear in this schedule with a @ beside them.

ACCOUNTS RECEIVABLE @
 Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.

- The middle column lists similar records series from one or more of the schedules that have been issued separately for use by specific local agencies.
- The right-hand column lists the local agency program schedule that includes the records series listed in the middle column. The agencies represented in the right column include, but are not limited to, local health departments, Registers of Deeds, Sheriff’s offices, local social services agencies, and tax offices.

If you need further information, please contact a Records Management Analyst.

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable	Accounts Receivable: Clinical Services	Local Health Departments Schedule

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable (cont.)	Accounts Receivable – Client Services	LME Schedule LME-MCO Schedule
Administrative Directives, Regulations, and Rules	State Board of Elections Numbered Memos	County Board of Elections Schedule
Audits: Financial	Clinical Record Audits	Local Health Departments Schedule
	Clinical Record Audits	LME Schedule
	Clinical Record Audits	LME-MCO Schedule
Audits: Performance	Pharmacy Audit Records	Local Health Departments Schedule
Blueprints and Specifications	Blueprints and Specifications	Local Government Agencies Program Schedule
	Project Records – Core	
Community Awards	Student Awards and Honors Records	Local Public School Unit Schedule
Conferences and Workshops	Health Promotion Training Records	Local Health Departments Schedule
Constituent Comments, Complaints, Petitions, and Service Requests	Animal Complaint Records	Local Government Agencies Program Schedule
	Illegal Dumping File	
	Violations: Building and Housing	
	Violations: Solid Waste Management	
	Complaints (Law Enforcement)	County Sheriff's Office
	Complaints	
	Complaints: All Service Areas	
	Animal Complaints	
Complaints File	LME Schedule	
Complaints File	LME-MCO Schedule	
Contracts, Leases, and Agreements	School Health Provider Contracts	Local Health Departments Schedule
	Petroleum Leases Register	Register of Deeds Schedule
Disaster and Emergency Management Plans	Public Health Emergency Preparedness and Response Records	Local Health Departments Schedule
Equipment and Vehicle Maintenance, Repair, and Inspection Records	Equipment and Instrument Maintenance and Repair File	Local Health Departments Schedule
	Autopsy and Surgical Pathology: Instrument Maintenance Records	Public Hospitals Schedule
	Clinical Laboratory Records: Instrument Maintenance Records	
	Cytology Records: Instrument Maintenance Records File	
	Instrument Maintenance File	

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule	
Grants Grants: Financial	CDBG Records CDBG Outstanding Loan Balances CDBG Subject to Reversion of Assets Provisions or Change of Use of Real Property Continuum of Care Records Emergency Solutions Grants Records Home Investment Partnerships Program Records Housing Assistance for Persons with Disabilities Housing Opportunities for Persons with AIDS Records	Local Government Agencies Program Schedule	
Indices	Board of Adjustment Case Files and Indexes Conditional Use Permit Records and Index Rezoning Records and Indexes	Local Government Agencies Program Schedule	
	Master Client Identification File (Master Client Index)	LME Schedule LME-MCO Schedule	
	Master Patient Index	Public Hospital Schedule	
	Armed Forces Discharges and Index Chattel Mortgages and Index Corporations (Incorporations) Records and Index Deeds, Record of and Index Deeds of Trust (Mortgages), Record of and Index Highway Right-of-Way Maps and Index Land Sold for Taxes and Index Merchant Returns and Index Mineral Rights Records and Index Notaries Public Records and Index Official Record Book and Index Partnerships and Assumed Names Records and Index Plats, Maps, and Index Registration of Titles (Torrens Act) and Index Surveys, Record of and Index Timber Marks and Index Vital Records: Births and Index Vital Records: Deaths and Index Vital Records: Delayed Births and Index	Register of Deeds Schedule	
	Inventories	Drug Inventories	Local Health Departments Schedule

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Inventories (cont.)	Drugs Inventories	Public Hospitals Schedule
Maps: All Other	Utilities: Maps (Utility Installations & Distributions)	Local Government Agencies Program Schedule
	Plats, Maps, and Index	Register of Deeds Schedule
	Maps (Utility Installations and Distributions)	Water and Sewer Authorities and Sanitary Districts Schedule
Policies and Procedures	Clinical Policies and Procedures Laboratory Procedures Manual Behavioral Health Program Policy and Procedure Records	Local Health Departments Schedule
	Laboratory Procedures/Protocol File	Public Hospitals Schedule
Poll List/Registration List/Roster/Authorization to Vote (ATV)	Poll List/Registration List/Roster/Authorization to Vote (ATV)	County Board of Elections Schedule
Projects	Appraisal Project File Project Records – Cancelled Project Records – Core Project Records – Engineering & Compliance	Local Government Agencies Program Schedule
	State Board of Elections Correspondence and Reports	County Board of Elections Schedule
	Water and Wastewater System Project Records	Waste and Sewer Authorities and Sanitary Districts Schedule
Publicity Records	Student Publicity Records	Local Public School Unit Schedule
Rate and Fee Schedules	Fee Schedules	Local Health Departments Schedule
	Fee Schedules	LME Schedule
	Fee Schedules	LME-MCO Schedule
Recordings: Customer Call Center Recordings Audio-Visual Recordings	Traffic Video Recordings and Data Law Enforcement Audio and Video Recordings Communication Records Electronic Recordings of Interrogations	Local Government Agencies Program Schedule
	Audio and Video Recordings Communication Records Electronic Recordings of Interrogations (Juvenile and Homicide)	County Sheriff's Office

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies	Land Development and Planning Studies and Reports Ambulance Call Reports/Patient Care Reports North Carolina Fire Incident Report Pool Records Environmental: Customer Usage Records Environmental: Discharge Monitoring Reports Environmental: Landfill Monitoring Reports Environmental: Reports Submitted to U.S. Environmental Protection Agency Utilities: Daily Water and Wastewater Facility Operators Logs Utilities: Service Interruption Records Utilities: Wastewater Maintenance Operation Reports Water Quality: Pretreatment Program Records Water Quality: Public Water Sanitary Survey Records Appraisal Reports Traffic Analysis Project Records – Core Project Records – Engineering & Compliance Alarm Call Reports Arrest Reports Chemical Analysis Records Crime Analysis Records Detention Facility Incident Reports Detention Facility Physical Force Records Incident Response Reports Inmate Death Reports Laboratory Case Records Multiple Firearms Sales Reports Multiple Firearms Sales Reports Destruction Records Traffic Accident Reports	Local Government Agencies Program Schedule
(continued on following page)		

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Daily Store Reports Monthly Law Enforcement Activity Reports Monthly Operating Report to Board Receiving Report Sales Reports Stock Difference Reports Weekly Warehouse Reports	Alcoholic Beverage Control Boards Schedule
	Campaign Contribution and Expenditure Reports Ballot Reports State Board of Elections Correspondence and Reports Voter Registration Lists and Reports	County Board of Elections Schedule
	Alarm Call Reports Arrest Reports Detention Facility Incident Reports DWI Reports Incident Response Reports Inmate Death Reports Traffic Accident Reports	County Sheriff's Office
	Program Time and Activity Reports Medicare Disbursement Reports Communicable Disease Reports Test Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Local Health Departments Schedule
	Medicare Disbursement Reports	LME Schedule LME-MCO Schedule
(continued on following page)	Admission/Discharge/Transfer Reports Communicable Disease Reports Call-In Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Public Hospitals Schedule

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Certified Facility Operators Logs and Reports Discharge Monitoring Reports Periodic Inspection Reports of Industrial Facilities Wastewater Maintenance Operation Reports	Waste and Sewer Authorities and Sanitary Districts Schedule
Strategic Plan	Land Development and Planning Studies and Reports Parks Planning File Comprehensive Plan and Amendments Environmental: Comprehensive Solid Waste Management Plan and Amendments Planning File (Street Maintenance)	Local Government Agencies Program Schedule

1

1099 FORMS. *SEE* TAX FORMS

A

ABOLISHED POSITIONS, 43
ABSTRACTS OF MUNICIPAL ELECTIONS, 1
ACCIDENT/INCIDENT REPORTS (CUSTOMER AND EMPLOYEE), 80
ACCOUNTS PAYABLE, 23
ACCOUNTS RECEIVABLE, 23
ACCOUNTS UNCOLLECTABLE, 24
ACCREDITATION RECORDS, 1
ADDRESS POINTS, 38
ADMINISTRATION AND MANAGEMENT RECORDS, 1
ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES, 1
ADMINISTRATIVE INVESTIGATIONS, 43
AFFIDAVITS OF PUBLICATION, 67
AGENCY PUBLICATIONS, 75
AMBULANCE SERVICE BILLS AND RECORDS FOR EMERGENCY MEDICAL SERVICE. *SEE* ACCOUNTS PAYABLE
ANNEXATION FILE, 67
ANNUAL BUDGET, 24
APPLICATIONS FOR EMPLOYMENT, 44
APPRENTICESHIP PROGRAM RECORDS, 44
APTITUDE AND SKILLS TESTING RECORDS, 45
ARBITRAGE RECORDS, 24
ASBESTOS MANAGEMENT PLAN. *SEE* HAZARDOUS MATERIALS MANAGEMENT
ASBESTOS TRAINING, 45
AUDIO-VISUAL RECORDINGS, 75
AUDITS
 FINANCIAL, 24
 IT SYSTEMS, 61
 PERFORMANCE, 2
AUTHENTICATIONS, 67
AUTHORIZATION FORMS, 24

B

BANK STATEMENTS, 25
BANK STATEMENTS AND RECONCILIATIONS, 25
BENEFITS RECORDS, 46
BENEFITS REIMBURSEMENT PLAN. *SEE* BENEFITS RECORDS
BIDS FOR DISPOSAL OF PROPERTY, 25
BIDS FOR PURCHASE, 25
BIOGRAPHICAL DATA. *SEE* HISTORY RECORDS

INDEX

BLOODBORNE PATHOGEN TRAINING, 46
BLUEPRINTS AND SPECIFICATIONS, 2
BOND CLOSING RECORDS, 25
BOND REGISTER, 26
BONDS, 3
BONDS, NOTES, AND COUPONS, 26
BUDGET ADMINISTRATION RECORDS, 26
BUDGET EXECUTION RECORDS, 26
BUDGET REPORTS, 26
BUDGET REQUESTS AND WORKING PAPERS, 26
BUDGET RESOLUTIONS AND ORDINANCES, 27
BUDGET, FISCAL, AND PAYROLL RECORDS, 23
BULLETINS, 3
BUSINESS CERTIFICATION RECORDS, 3
BUSINESS DEVELOPMENT SUBJECT FILE, 3

C

CALENDARS OF EVENTS AND APPOINTMENTS, 3
CALL CENTER RECORDINGS. *SEE* CUSTOMER CALL CENTER RECORDINGS
CANCELED CHECKS. *SEE* BANK STATEMENTS AND RECONCILIATIONS
CASH REPORTS. *SEE* ACCOUNTS RECEIVABLE
CENSUS PROJECT RECORDS, 3
CHARTER RECORDS, 4
CHECK REGISTERS. *SEE* BANK STATEMENTS AND RECONCILIATIONS
CHECK STUBS. *SEE* BANK STATEMENTS AND RECONCILIATIONS
CITIZEN COMPLAINTS. *SEE* CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS
CIVIL RIGHTS CASE RECORDS, 68
CIVIL RIGHTS RECORDS, 69
COLLECTED DATA, 4
COMMUNITY AWARDS, 75
COMPLAINTS (CONSTITUENTS). *SEE* CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS
COMPUTER AND NETWORK USAGE RECORDS, 61
CONDEMNATION RECORDS, 69
CONFERENCES AND WORKSHOPS, 76
CONFLICTS OF COMMITMENT, 70
CONFLICTS OF INTEREST, 70
CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS, 5
CONSTITUENT SURVEYS, 5
CONTRACT BUDGET REPORTS, 26
CONTRACT WORKER RECORDS, 57
CONTRACTS, LEASES, AND AGREEMENTS, 70

CORE DATA (GIS RECORDS). *SEE* GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA
CORPORATE LIMITS, 38
CORRESPONDENCE (LEGAL), 72
CORRESPONDENCE AND MEMORANDA, 6
COST ALLOCATION PLANS, 27
CREDIT/DEBIT/PROCUREMENT CARD RECORDS, 27
CUSTOMER CALL CENTER RECORDINGS, 6

D

DAILY DETAIL REPORTS. *SEE* BUDGET REPORTS
DATA DOCUMENTATION (METADATA) (GIS RECORDS). *SEE* GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA)
DATA DOCUMENTATION RECORDS, 61
DATA MIGRATION RECORDS, 62
DATA WAREHOUSES, 62
DEBIT CARD PAYMENTS. *SEE* PAYMENT CARD DATA
DEBT FINANCING. *SEE* LOAN RECORDS
DECLARATORY RULINGS, 70
DELEGATION OF AUTHORITY RECORDS, 71
DEPOSITS. *SEE* ACCOUNTS RECEIVABLE
DESTRUCTIONS LOG, 10
DETAIL REPORT. *SEE* FINANCIAL REPORTS
DIGITIZATION AND SCANNING RECORDS, 62
DIRECT DEPOSIT FORMS. *SEE* ELECTRONIC FUNDS TRANSFERS
DIRECTORIES, ROSTERS, OR INDICES, EMPLOYEE, 46
DISABILITY SALARY CONTINUATION CLAIMS, 47
DISASTER AND EMERGENCY MANAGEMENT PLANS, 81
DISASTER RECOVERY, 81
DISCIPLINARY ACTIONS, 47
DONATIONS AND SOLICITATIONS, 27
DRUG AND ALCOHOL PROGRAMS FILE. *SEE* EMPLOYEE ASSISTANCE PROGRAMS
DUAL EMPLOYMENT, 48

E

EASEMENTS AND RIGHT-OF-WAY AGREEMENTS, 71
EDUCATIONAL ASSISTANCE, EMPLOYEE, 48
EDUCATIONAL LEAVE AND REIMBURSEMENT, 48
EDUCATIONAL MATERIALS, 76
EDUCATIONAL RECORDS, EMPLOYEE, 58
ELECTRONIC FUNDS TRANSFERS, 27
ELECTRONIC RECORDS POLICIES AND PROCEDURES, 62
EMERGENCY DRILLS AND EQUIPMENT RECORDS, 81
EMERGENCY NOTIFICATIONS, 81
EMPLOYEE ASSISTANCE PROGRAMS, 48

EMPLOYMENT ELIGIBILITY RECORDS, 49
EMPLOYMENT SELECTION RECORDS, 49
ENCROACHMENTS, 71
EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS, 6
EQUIPMENT INVENTORIES, 10
EQUIPMENT REFERENCE RECORDS, 7
EQUIPMENT USAGE RECORDS, 7
ESCHEATS AND UNCLAIMED PROPERTY, 28
EXIT INTERVIEW RECORDS, EMPLOYEE, 50
EXPENDITURE REPORTS. *SEE* BUDGET REPORTS
EXPUNCTIONS, 71
EXTRATERRITORIAL JURISDICTIONS, 39

F

FACILITY MAINTENANCE, REPAIR AND INSPECTION RECORDS, 7
FACILITY SERVICE AND MAINTENANCE AGREEMENTS. *SEE* CONTRACTS, LEASES, AND AGREEMENTS
FACILITY USAGE RECORDS, 7
FAMILY MEDICAL LEAVE ACT (FMLA) RECORDS, 50
FEE SCHEDULES, 17
FILE PLAN, 22
FINANCIAL JOURNALS AND LEDGERS, 28
FINANCIAL REPORTS, 28
FIRE EXTINGUISHER RECORDS. *SEE* EMERGENCY DRILLS AND EQUIPMENT RECORDS
FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS, 82
FIXED ASSETS. *SEE* INVENTORIES
FIXED NUCLEAR FACILITIES PLANS FILE, 82
FORMS AND TEMPLATES, 7
FUEL OIL STORAGE TANK RECORDS, 82
FUND DRIVE AND EVENT RECORDS, 76

G

GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA, 36
GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA), 36
GEOGRAPHIC INFORMATION SYSTEM (GIS) INTERNAL STANDARDS AND PROCEDURES, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) MONITORING RECORDS, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) OPERATIONAL RECORDS, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) PROJECT RECORDS, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS, 36

GOVERNING AND ADVISORY BODY MEMBER FILES.
SEE PUBLIC BODIES: \MEMBER FILES
GOVERNMENT EMPLOYEES RETIREMENT SYSTEM
MONTHLY REPORTS, 28
GRANT PROPOSALS, 8
GRANTS, 8
FINANCIAL, 29
GRIEVANCES, 51

H

HAZARDOUS MATERIALS MANAGEMENT, 83
HAZARDOUS MATERIALS TRAINING RECORDS, 51
HEALTH CERTIFICATES, EMPLOYEE. SEE MEDICAL
RECORDS
HISTORICAL DESIGNATIONS RECORDS, 9
HISTORY RECORDS (AGENCY AND EMPLOYEES, 9

I

I-9 FORMS. SEE EMPLOYMENT ELIGIBILITY RECORDS
IMAGING RECORDS, 62
IMPROPER CONDUCT INVESTIGATIONS, 9
INDICES, 9
INFORMATION TECHNOLOGY (IT) RECORDS, 61
INFORMATION TECHNOLOGY ASSISTANCE RECORDS,
63
INSPECTION RECORDS. SEE EQUIPMENT AND
VEHICLE MAINTENANCE, REPAIR, AND
INSPECTION RECORDS
INSPECTION RECORDS, FACILITY, 7
INSURANCE POLICIES, 84
INTERAGENCY PROGRAMS, 9
INTERNAL STANDARDS AND PROCEDURES (GIS
RECORDS) \T, 37
INTERNSHIP PROGRAM, 51
INVENTORIES, 10
INVESTIGATION AND HEARING RECORDS, 72
INVESTMENTS, 29
INVITATIONS, 77
INVOICES. SEE ACCOUNTS PAYABLE
IT DISASTER PREPAREDNESS AND RECOVERY PLANS.
SEE DISASTER AND EMERGENCY MANAGEMENT
PLANS

L

LAND OWNERSHIP RECORDS, 72
LAW ENFORCEMENT TRAINING, 51
LEAVE RECORDS, 52
LEGAL OPINIONS, 72
LEGAL RECORDS, 67
LEGAL REVIEW RECORDS, 72

LEGISLATION AND REGULATORY RECORDS, 10
LTERS MONTHLY REPORTS. SEE GOVERNMENT
EMPLOYEES RETIREMENT SYSTEM MONTHLY
REPORTS
LITIGATION CASE RECORDS, 73
LOAN RECORDS, 30
LOCAL GOVERNMENT COMMISSION FINANCIAL
STATEMENTS, 30
LOGISTICS MATERIALS, 10
LONGEVITY PAY, 30
LOSS CONTROL INSPECTION REPORTS, 84
LOST, STOLEN, OR DAMAGED PROPERTY REPORTS,
84

M

MAIL, UNDELIVERABLE/RETURNED, 10
MAILING AND DISTRIBUTION RECORDS, 10
MAINTENANCE RECORDS. SEE EQUIPMENT AND
VEHICLE MAINTENANCE, REPAIR, AND
INSPECTION RECORDS
MAINTENANCE RECORDS, FACILITY, 7
MANAGEMENT STUDIES. SEE REPORTS AND STUDIES
MAPPING PROJECT RECORDS, 40
MAPS
ALL OTHER, 42
PARCEL, 41
PARKS, 41
MAPS (PAPER). SEE MAPS: ALL OTHER
MEDIA FILE, 77
MEDICAL RECORDS, EMPLOYEE, 52
MEMBERSHIP RECORDS, 11
METADATA (GIS RECORDS). SEE GEOGRAPHIC
INFORMATION SYSTEM (GIS) DATA
DOCUMENTATION (METADATA)
MILITARY LEAVE, 53
MINUTES OF PUBLIC BODIES. SEE PUBLIC BODIES:
MINUTES
MISCELLANEOUS (NON-BUILDING) APPLICATIONS,
LICENSES, AND PERMITS, 11
MONITORING RECORDS (GIS RECORDS). SEE
GEOGRAPHIC INFORMATION SYSTEM (GIS)
MONITORING RECORDS

N

NATIONAL FLOOD INSURANCE PROGRAM RECORDS,
84
NETWORK AND SYSTEM SECURITY RECORDS, 63
NETWORK DIAGRAMS, 63
NEWSPAPER CLIPPINGS. SEE HISTORY RECORDS
NOTICES OF PUBLIC MEETINGS. SEE PUBLIC BODIES:
MEETING NOTICES

O

OATHS OF OFFICE, 73
OCCUPATIONAL SAFETY AND HEALTH
ADMINISTRATION (OSHA), 85
OFFICE AND PROPERTY SECURITY RECORDS, 11
OPERATIONAL RECORDS (GIS RECORDS). *SEE*
GEOGRAPHIC INFORMATION SYSTEM (GIS)
OPERATIONAL RECORDS
ORDINANCE DEVELOPMENT RECORDS, 12
ORDINANCES, 12
ORTHOIMAGERY, 39
OSHA, 85

P

PARKING. *SEE* SECURITY RECORDS, EMPLOYEE
PAYMENT CARD DATA, 30
PAYROLL AND EARNINGS RECORDS, 31
PAYROLL DEDUCTION RECORDS, 32
PENSION PLAN ENROLLMENT FORMS, EMPLOYEE.
SEE RETIREMENT RECORDS
PERFORMANCE REVIEWS, EMPLOYEE, 53
PERMISSIONS, 73
PERSONNEL ACTION NOTICES, 53
PERSONNEL RECORDS, 43
PERSONNEL RECORDS (OFFICIAL COPY), 54
PERSONNEL RECORDS (SUPERVISOR COPY), 54
PEST CONTROL, 12
PETITIONS (CONSTITUENT). *SEE* CONSTITUENT
COMMENTS, COMPLAINTS, PETITIONS, AND
SERVICE REQUESTS
PETTY CASH. *SEE* ACCOUNTS RECEIVABLE
PHONE LOGS, 12
POLICIES AND PROCEDURES, 13
POLICIES AND PROCEDURES (PERSONNEL), 55
POLL LIST, 13
POLYGRAPH RECORDS, EMPLOYEE, 55
POPULAR ANNUAL FINANCE REPORT, 77
POSITION CLASSIFICATION, 56
POSITION CONTROL, 56
POSITION DESCRIPTIONS, 56
POSITION EVALUATIONS, 56
POSITION HISTORY, 56
POSITION REQUISITION AND ANALYSIS RECORDS.
SEE POSITION CLASIFICATION, CONTROL, AND
HISTORY
POWELL BILL RECORDS, 32
PRE-TRIAL RELEASE PROGRAM RECORDS, 74
PRICE QUOTATIONS, 13
PROCEDURES (GIS RECORDS). *SEE* GEOGRAPHIC
INFORMATION SYSTEM (GIS) INTERNAL
STANDARDS AND PROCEDURES

PROCLAMATIONS AND ORDERS, 14
PROJECT DOCUMENTATION (INFORMATION
TECHNOLOGY), 64
PROJECT RECORDS (GIS RECORDS). *SEE* GEOGRAPHIC
INFORMATION SYSTEM (GIS) PROJECT RECORDS
PROJECTS, 14
PROPERTY INVENTORIES, 10
PROPERTY MANAGEMENT RECORDS, 14
PUBLIC BODIES
 \AGENDA AND MEETING PACKETS, 15
 \APPLICATIONS FOR APPOINTMENT, 15
 \APPOINTMENT REPORTS, 15
 \AUDIO AND VIDEO RECORDINGS OF MEETINGS,
 15
 \CORRESPONDENCE, 16
 \MEETING NOTICES, 16
 \MEMBER FILES, 16
 \MINUTES, 17
PUBLIC HEARINGS, 77
PUBLIC RECORDS REQUESTS, 78
PUBLIC RELATIONS RECORDS, 75
PUBLICATIONS RECEIVED. *SEE* REFERENCE (READING)
FILE
PUBLICITY RECORDS, 78
PURCHASE ORDERS, 32

Q

QUALIFIED PRODUCTS LISTS, 32

R

RATE SCHEDULES, 17
REBATE PROGRAM RECORDS, 18
RECONCILIATIONS (FINANCIAL), 25
RECORDS BACKUPS, SYSTEM MAINTENANCE
RECORDS, 65
RECORDS MANAGEMENT, 18
RECRUITMENT RECORDS, 56
REFERENCE (READING) FILE, 18
REFUND REPORTS. *SEE* FINANCIAL REPORTS
REGULATORY RECORDS (EXTERNAL). *SEE*
LEGISLATION AND REGULATORY RECORDS
RELEASE FORMS, 74
REPAIR RECORDS. *SEE* EQUIPMENT AND VEHICLE
MAINTENANCE, REPAIR, AND INSPECTION
RECORDS
REPAIR RECORDS, FACILITY, 7
REPORTS AND STUDIES, 19
REQUEST FOR CHANGE IN LOCAL GOVERNMENT
RECORDS SCHEDULE, 19
REQUEST FOR DISPOSAL OF ORIGINAL RECORDS
DUPLICATED BY ELECTRONIC MEANS, 21

REQUEST FOR DISPOSAL OF UNSCHEDULED RECORDS, 20
REQUESTS FOR INFORMATION, 20
REQUESTS FOR PROPOSALS, 20
REQUISITIONS, 33
RESOLUTION DEVELOPMENT RECORDS, 20
RESOLUTIONS, 20
RESPIRATOR PROGRAM RECORDS. *SEE* EMERGENCY DRILLS AND EQUIPMENT RECORDS
RETIREMENT RECORDS, EMPLOYEE, 57
RETURNED CHECKS. *SEE* ACCOUNTS UNCOLLECTABLE
RISK MANAGEMENT RECORDS, 80

S

SAFETY DATA SHEETS, 85
SALES AND USE TAX REPORTS. *SEE* TAX RETURNS
SALES INFORMATION. *SEE* ACCOUNTS RECEIVABLE
SCANNING RECORDS. *SEE* DIGITIZATION AND SCANNING RECORDS
SCHOLARSHIP RECORDS, 33
SEASONAL WORKER RECORDS, 57
SECONDARY EMPLOYMENT, 57
SECURITY RECORDS, EMPLOYEE, 82
SECURITY VIDEO RECORDINGS. *SEE* OFFICE AND PROPERTY SECURITY RECORDS
SELF-INSURER CERTIFICATIONS. *SEE* INSURANCE POLICIES
SERVICE AWARDS AND COMMENDATIONS, 58
SERVICE REQUESTS (CONSTITUENT). *SEE* CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS
SETTLEMENTS, 74
SHIFT PREMIUM PAY, 33
SOCIAL MEDIA, 78, 12
SOFTWARE LICENSE AND COPYRIGHT PROVISIONS RECORDS, 64
SPACE NEED STUDIES. *SEE* REPORTS AND STUDIES
SPECIAL EVENT RECORDS. *SEE* FUND DRIVE AND EVENT RECORDS
SPEECHES, 78
STAFF MEETINGS FILE, 21
STANDARDS (GIS RECORDS), 37
STATE AND OTHER COUNTY PROGRAMS. *SEE* REFERENCE (READING) FILE
STATE OF EMERGENCY, 80
STATEMENTS OF BACK PAY, 33
STOLEN PROPERTY REPORTS, 84
STRATEGIC PLAN, 21
STREET CENTERLINE, 40
SUGGESTIONS, EMPLOYEE, 58
SURPLUS PROPERTY, 21
SURVEYS, EMPLOYEE, 58

SYSTEM ACCESS RECORDS (INFORMATION TECHNOLOGY), 64
SYSTEM DOCUMENTATION RECORDS, 64
SYSTEM MAINTENANCE RECORDS
 \HARDWARE REPAIR OR SERVICE, 65
 \RECORDS BACKUPS, 65

T

TAX FORMS, 34
TAX RETURNS, 34
TECHNICAL PROGRAM DOCUMENTATION, 65
TEMPORARY EMPLOYEE RECORDS. *SEE* PERSONNEL RECORDS (OFFICIAL COPY)
TEXT MESSAGES, 12
TIME SHEETS, CARDS, AND ATTENDANCE RECORDS, 34
TRACKING MATERIALS, 21
TRAINING RECORDS, EMPLOYEE, 58
TRAVEL REIMBURSEMENTS, 35
TRAVEL REQUESTS, 22
TSERS MONTHLY REPORTS. *SEE* GOVERNMENT EMPLOYEES RETIREMENT SYSTEM MONTHLY REPORTS

U

UNEMPLOYMENT COMPENSATION CLAIMS, 59
UNEMPLOYMENT COMPENSATION REPORTS, 59
UNEMPLOYMENT INSURANCE, 59
UTILITY USAGE LOG. *SEE* EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS
UTILITY USAGE LOGS. *SEE* PHONE LOGS
UTILITY USAGE LOGS AND BILLS. *SEE* ACCOUNTS PAYABLE

V

VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS. *SEE* EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS
VEHICLE MILEAGE LOG. *SEE* EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS
VEHICLE REFERENCE RECORDS, 7
VEHICLE REGISTRATION CARDS, 22
VEHICLE TITLES, 74
VEHICLE USAGE RECORDS, 7
VENDORS, 35
VERIFICATION OF EMPLOYMENT RECORDS, 59
VETERANS COMMISSION QUARTERLY REPORTS. *SEE* REPORTS AND STUDIES
VOIP RECORDS, 66

VOLUNTEER RECORDS, 59
VOUCHERS. *SEE* ACCOUNTS RECEIVABLE

W

W-2 FORMS. *SEE* TAX FORMS
W-4 FORMS. *SEE* TAX FORMS
WARRANTIES. *SEE* EQUIPMENT AND VEHICLE
MAINTENANCE, REPAIR, AND INSPECTION
RECORDS
WEB MANAGEMENT AND OPERATIONS RECORDS
STRUCTURE, 66
WEBSITE (ELECTRONIC), 79
WORK ORDERS, 22

WORK SCHEDULES AND ASSIGNMENT RECORDS,
EMPLOYEE, 60
WORKERS' COMPENSATION PROGRAM
ADMINISTRATION, 60
WORKERS' COMPENSATION PROGRAM CLAIMS, 60
WORKFORCE DEVELOPMENT
 \LOCAL AREA JOB TRAINING PLAN RECORDS, 86
WORKFORCE DEVELOPMENT
 \AUDIT/AUDIT RESOLUTIONS, 86
WORKFORCE DEVELOPMENT
 \PARTICIPANT RECORDS, 86
WORKFORCE DEVELOPMENT RECORDS, 86
WORKSHOPS, 76

Town of Archer Lodge

For the Year Ended June 30, 2025

And Fee Estimates for the Following Four Years

1. Dale Place, Partner, will conduct the entire audit. There is no plan to use other staff. Scott May or a CPA contractor will prepare the financial statements and report to Scott May, Partner.
2. We will begin preliminary audit work in July 2025 and expect to complete work by October 31, 2025.
3. Cost for the fiscal year ending June 30, 2025, audit and financial statement preparation.

<u>Personnel</u>	<u>Position</u>	<u>Task</u>	<u>Estimated Hrs.</u>	<u>Rate</u>	<u>Total</u>
Dale Place	Partner	Audit	95	\$ 100.00	\$ 9,500.00
Scott May or other CPA	Partner or Contract Accountant	Financial Statement Preparation	75	100.00	7,500.00
Total			170.00		\$ 17,000.00

(Travel time, supplies, materials, and other cost are factored in the rates and are not charged separately.)

If there is a federal and/or State single audit, then we will charge \$7,000 for each major program.

The cost for the audit and financial statement preparation for the four years subsequent to June 30, 2025, will be based on any increase in time resulting from changing requirements in accounting and/or auditing standards, and/or the addition of capital projects and other fund types resulting from continued growth of the Town.

4. Other information provided upon request.



TOWN OF ARCHER LODGE FINANCIAL SUMMARY REPORT FOR PERIOD END JUNE 6, 2025

GENERAL FUND 10				
<i>REVENUES</i>	AMENDED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % COLLECTED
AD-VALOREM & MOTOR VEHICLE TAXES	1,408,000.00		1,394,953.47	99.07%
SALES TAXES	399,000.00		352,974.26	88.46%
FRANCHISE TAXES	160,000.00		89,378.87	55.86%
ALCOHOL BEV TAXES/JO CO ABC DIST	37,000.00		35,483.02	95.90%
PERMITS AND FEES	7,500.00		7,230.00	96.40%
FEE IN LIEU OF RECREATION	54,000.00		0.00	0.00%
PARKS & RECREATION FEES	70,000.00		72,095.00	102.99%
PARKS & RECREATION RENTALS	11,000.00		11,716.00	106.51%
PEG CHANNEL SUPPORT	97,000.00		39,701.25	40.93%
MISCELLANEOUS/ALVM BRICK REVENUES/INSUR PROCEEDS	7,500.00		13,939.75	185.86%
CAROLINA PANTHERS COMMUNITY/JO CO TOURISM/JO CO OPEN SPACE GRANT	5,000.00		5,000.00	100.00%
REG ECONOMIC DEVELOP RES GRANT '24	0.00		0.00	#DIV/0!
INVESTMENT EARNINGS	46,000.00		42,613.91	92.64%
TRANSFER IN FROM CAP RES FUND 30	0.00		0.00	#DIV/0!
TRANSFER IN FROM PARK RES FUND 31	56,000.00		56,000.00	100.00%
TRANSFER IN FROM PUBLIC SAFE RES FUND 32	250,000.00		0.00	0.00%
FUND BALANCE APPROPRIATION	297,955.00		0.00	0.00%
TOTALS	2,905,955.00	0.00	2,121,085.53	72.99%
<i>EXPENDITURES</i>	AMENDED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % SPENT
GOVERNING BODY	58,300.00		32,035.05	54.95%
ADMINISTRATION	465,350.00		376,077.88	80.82%
JO CO TAX COLLECTION FEES	37,000.00		34,349.86	92.84%
LEGAL	18,000.00		12,678.77	70.44%
PROPERTY TAXES	100.00		63.16	63.16%
PUBLIC BUILDINGS	195,395.00		174,625.67	89.37%
PEG MEDIA PARTNERS	97,000.00		39,701.25	40.93%
PUBLIC SAFETY	852,250.00		584,132.27	68.54%
TRANSPORTATION-PUBLIC WORKS	23,000.00		17,470.18	75.96%
PLANNING & ZONING	256,975.00		199,965.55	77.82%
CULTURAL & RECREATION	623,460.00		538,601.69	86.39%
DEBT SERVICES	140,125.00		140,109.78	99.99%
TRANSFER TO CAP RESERVE	0.00		0.00	#DIV/0!
TRANSFER TO PARK RESERVE	139,000.00		82,855.08	59.61%
TRANSFER TO PUBLIC SAFETY RESERVE	0.00		0.00	#DIV/0!
TRANSFER TO REG ECON DEVELOP RES GRANT	0.00		0.00	#DIV/0!
				#DIV/0!
	2,905,955.00	0.00	2,232,666.19	76.83%
Y-T-D GENERAL FUND INCREASE (DECREASE)		0.00	(111,580.66)	

CAPITAL RESERVE FUND 30				
<i>REVENUES</i>	ADOPTED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % COLLECTED
INVESTMENT EARNINGS	1,000.00		1,002.52	100.25%
TRANSFER FROM GEN FUND 10	0.00		0.00	#DIV/0!
FUND BALANCE APPROPRIATED	0.00		0.00	#DIV/0!
TOTALS	1,000.00	0.00	1,002.52	100.25%
<i>EXPENDITURES</i>	ADOPTED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % SPENT
TRANSFER TO GEN FUND 10	0.00		0.00	#DIV/0!
TRANSFER TO FUND BALANCE	1,000.00		0.00	0.00%
TOTALS	1,000.00	0.00	0.00	0.00%
Y-T-D CAP RESERVE FUND INCREASE (DECREASE)		0.00	1,002.52	

PARK RESERVE FUND 31				
<i>REVENUES</i>	ADOPTED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % COLLECTED
INVESTMENT EARNINGS	3,000.00		2,948.03	98.27%
TRANSFER FROM GEN FUND 10	139,000.00		82,855.08	59.61%
TRANSFER FROM AL TOWN PRK FND 41	0.00		8,090.51	#DIV/0!
TOTALS	142,000.00	0.00	93,893.62	66.12%
<i>EXPENDITURES</i>	ADOPTED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % SPENT
RECREATION DEVELOPMENT	86,000.00		0.00	0.00%
TRANSFER TO GEN FUND 10	56,000.00		56,000.00	100.00%
TRANSFER TO FUND BALANCE	0.00		0.00	#DIV/0!
TOTALS	142,000.00	0.00	56,000.00	39.44%
Y-T-D PARK RESERVE FUND INCREASE (DECREASE)		0.00	37,893.62	

PUBLIC SAFETY RESERVE FUND 32				
<i>REVENUES</i>	ADOPTED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % COLLECTED
INVESTMENT EARNINGS	16,000.00		15,572.29	97.33%
TRANSFER FROM GEN FUND 10	0.00		0.00	#DIV/0!
FUND BALANCE APPROPRIATED	234,000.00		0.00	0.00%
				#DIV/0!
TOTALS	250,000.00	0.00	15,572.29	6.23%
<i>EXPENDITURES</i>	ADOPTED BUDGET	MONTH ACTIVITY	ACTUAL TO DATE	Y-T-D % SPENT
TRANSFER TO GEN FUND 10	250,000.00		0.00	0.00%
TRANSFER TO FUND BALANCE	0.00		0.00	#DIV/0!
TOTALS	250,000.00	0.00	0.00	0.00%
Y-T-D PUB SAFE RES FUND INCREASE (DECREASE)		0.00	15,572.29	



Kim P. Batten

FINANCE OFFICER

ASSISTANT TOWN ADMINISTRATOR



TOWN OF ARCHER LODGE
 FINANCIAL SUMMARY REPORT
 FISCAL YEAR COMPARISON FOR
 PERIOD ENDING JUNE 6

GENERAL FUND				
<i>REVENUES</i>		06/06/25	06/06/24	DIFFERENCE
	AD-VAL & MOTOR VEHICLE TAXES	1,394,953.47	1,285,896.44	109,057.03
	SALES TAXES	353,974.26	298,667.85	55,306.41
	FRANCHISE TAXES	89,378.87	81,389.86	7,989.01
	ALCOHOL BEV TAXES/JO CO ABC DIST	35,483.02	42,219.46	(6,736.44)
	PERMITS AND FEES	7,230.00	5,015.00	2,215.00
	FEE IN LIEU OF RECREATION	0.00	0.00	0.00
	PARKS & RECREATION FEES	72,095.00	61,275.00	10,820.00
	PARKS & RECREATION RENTALS	11,716.00	12,163.20	(447.20)
	PEG CHANNEL SUPPORT	39,701.25	25,806.44	13,894.81
	MISCELLANEOUS/ALVM BRICK REVENUES/INSUR PROCEEDS	13,939.75	6,300.95	7,638.80
	INVESTMENT EARNINGS	42,613.91	63,294.89	(20,680.98)
	GRANTS (ARPA, SCIF, JOCO OPEN SPACE & TOURISM, CAROLINA PANTHERS)	5,000.00	53,500.00	(48,500.00)
	GRANT-REG ECON DEVEL RES (24REDR)	0.00	2,365,000.00	(2,365,000.00)
	TRANSFER IN FROM CAPITAL RES FND 30	0.00	125,000.00	(125,000.00)
	TRANSFER IN FROM PARK RESERVE FND 31	56,000.00	58,000.00	(2,000.00)
	TRANSFER IN FROM PUBLIC SAFE RES FND 32	0.00	0.00	0.00
Y-T-D INCREASE (DECREASE)		2,122,085.53	4,483,529.09	(2,361,443.56)
<i>EXPENDITURES</i>		06/06/25	06/06/24	DIFFERENCE
	GOVERNING BODY	32,035.05	49,206.13	(17,171.08)
	ADMINISTRATION	376,077.88	375,979.26	98.62
	JO CO TAX COLLECTION FEES	34,349.86	33,294.68	1,055.18
	LEGAL	12,678.77	9,000.00	3,678.77
	PROPERTY TAXES	63.16	2.60	60.56
	PUBLIC BUILDINGS	174,625.67	496,326.24	(321,700.57)
	PEG MEDIA PARTNERS	39,701.25	25,806.44	13,894.81
	PUBLIC SAFETY	584,132.27	495,801.01	88,331.26
	TRANSPORTATION-PUBLIC WORKS	17,470.18	18,532.57	(1,062.39)
	PLANNING & ZONING	199,965.55	201,047.57	(1,082.02)
	CULTURAL & RECREATION	538,601.69	880,254.43	(341,652.74)
	DEBT SERVICES	140,109.78	132,883.92	7,225.86
	TRANSFER TO CAP RESERVE	0.00	0.00	0.00
	TRANSFER TO PARK RESERVE	82,855.08	83,014.77	(159.69)
	TRANSFER TO PUBLIC SAFETY RESERVE	0.00	0.00	0.00
	TRANSFER TO ARPA, SCIF, 24REDR FUNDS	0.00	2,365,000.00	(2,365,000.00)
Y-T-D INCREASE (DECREASE)		2,232,666.19	5,166,149.62	(2,933,483.43)
Y-T-D INCREASE (DECREASE)		(110,580.66)	(682,620.53)	572,039.87

Kim P. Batten

FINANCE OFFICER
 ASSISTANT TOWN ADMINISTRATOR



Archer Lodge Animal Control Monthly Report

May 2025

Activities	
Cat Complaints	4
Cat Traps Deployed	
Dog Complaints	5
Dog Traps Deployed	
Cat Bite	1
Dog Bite	
Animal Cruelty	
Vicious Animal	
Wildlife Complaint	1
Educational Calls/Presentations	
Walking Patrol	
Holding Area Maintenance	
County Referrals	
Assist LEO (JC/SO)	
Assist County Animal Control	
Telephone follow-up	2
Welfare Check/Educational visit	
Livestock Complaint	
Total:	13

Enforcement Action	
Cats Collected/Transported	4
Dogs Collected/Transported	
Leash/Tethered Law Violations	1
Leash Law Verbal Warnings	1
Verbal/Written Warnings	
Animal Neglect Violations	
Barking Dog Violations	
Carcass Removal	
Quarantined Animals	
Total Enforcement Actions	6

Total Incident Reports Taken:

Billing Information:			
	Bill Amount	Occurrence	Amount
a. - Set Trap / collect trap / carcass removal =	\$20.15		\$0.00
b. - Check Trap (no collection) =	\$20.15		\$0.00
c. - Collect Animal =	\$20.15	4	\$80.60
d. - Transport Animal			
i - Accompanied w/ animal collected in Clayton =	\$29.71	1	\$29.71
ii - Without animal collected in Clayton =	\$37.99	3	\$113.97
e. - Complaint: Welfare Check / Follow-Up / Education=	\$33.06	7	\$231.42
f. - Complaint: Telephone Follow - Up =	\$6.45	3	\$19.35
g. - Report taken / Investigation / Preparation =	\$17.04	3	\$51.12
h. - Clayton PD backup for ACO =	\$75.00		\$0.00
Total Amount to bill			\$526.17

CAD Events Billed for:

- 2025106600 - Dog vs dog incident
- 2025106758 - Cat pick up.
- 2025109124 - Cat pick up
- 2025109259 - Dog vs dog follow up by phone
- 2025110141 - Cat pick up
- 2025110985 - Cat pick up
- 2025118924 - Follow up for Johnston County Animal Control
- 2025121409 - Dog vs dog incident
- 2025121581 - Bat on porch
- 2025121630 - Dog vs dog follow up
- 2025121657 - Dog vs dog follow up by phone
- 2025128215 - Dogs at large
- 2025130643 - Dogs at large
- 2025130727 - Cat bite



Archer Lodge Animal Control Monthly Report

June 2025

Activities	
Cat Complaints	3
Cat Traps Deployed	1
Dog Complaints	5
Dog Traps Deployed	1
Cat Bite	
Dog Bite	
Animal Cruelty	
Vicious Animal	
Wildlife Complaint	1
Educational Calls/Presentations	
Walking Patrol	
Holding Area Maintenance	
County Referrals	
Assist LEO (JC SO)	
Assist County Animal Control	
Telephone follow-up	
Welfare Check/Educational visit	1
Livestock Complaint	
Total:	12

Total Incident Reports Taken: 2

Enforcement Action	
Cats Collected/Transported	5
Dogs Collected/Transported	3
Leash/Tethered Law Violations	2
Leash Law Verbal Warnings	
Verbal/Written Warnings	
Animal Neglect Violations	
Barking Dog Violations	
Carcass Removal	1
Quarantined Animals	
Total Enforcement Actions	11

Billing Information:			
	Bill Amount	Occurrence	Amount
a. - Set Trap / collect trap / carcass removal =	\$20.15	3	\$60.45
b. - Check Trap (no collection) =	\$20.15	1	\$20.15
c. - Collect Animal =	\$20.15	5	\$100.75
d. - Transport Animal			
i - Accompanied w/ animal collected in Clayton =	\$29.71	1	\$29.71
ii - Without animal collected in Clayton =	\$37.99	4	\$151.96
e. - Complaint: Welfare Check / Follow-Up / Education=	\$33.06	1	\$33.06
f. - Complaint: Telephone Follow - Up =	\$6.45		\$0.00
g. - Report taken / Investigation / Preparation =	\$17.04	2	\$34.08
h. - Clayton PD backup for ACO =	\$75.00		\$0.00
Total Amount to bill			\$430.16

CAD Events Billed for:

- 2025133278 - Dogs at large. Trap set.
- 2025133584 - Dog picked up
- 2025133622 - Dogs at large
- 2025134065 - Dog picked up. Trap picked up.
- 2025134148 - Dog returned to owner
- 2025139705 - Dog picked up
- 2025139911 - Cat trap set
- 2025142237 - Check trap. Opossum released.
- 2025143864 - 5 kittens picked up
- 2025144195 - Trap picked up
- 2025150692 - Injured rabbit picked up
- 2025150873 - Welfare check for dog

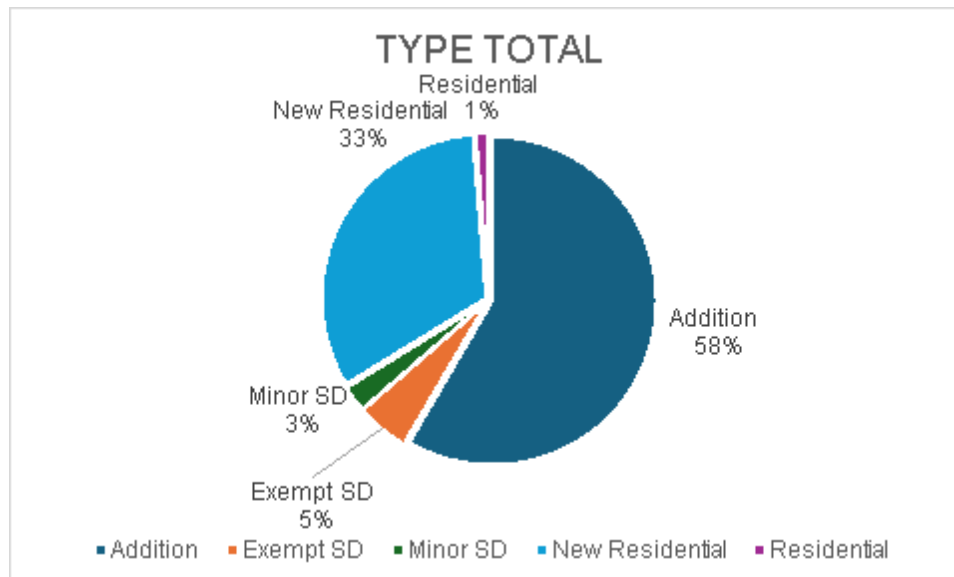
7/14/25

Town of Archer Lodge Planning and Zoning Report for FY2025 To-Date



Permits

- 77 Zoning Approval Documents issued in FY25 (July 24 to June 25)
- 11 Permits issued in April
- 26 New Single-Family Homes/MFH



Inquiries/Updates

- Westside Park
 - Grading & clearing has begun
 - The old farmhouse has been removed from the site
 - Finalizing coordination with Duke Energy and site utilities
 - Plans for Maintenance Building are complete
- Ordinance Update
 - We are coordinating with Municode to have our online Ordinance file updated to its current state with recent Zoning Amendments
- NCDOT Covered Bridge Rd Widening Project – We received the full set of site plans for the project set to soon begin



**TOWN OF ARCHER LODGE
RESOLUTION APPROVING LOCAL RECORD
RETENTION AND DISPOSITION SCHEDULES**

WHEREAS, in accordance with N.C. Gen. Stat. § 121-5(c) and § 132-8, the State Archives of North Carolina of the Department of Natural and Cultural Resources has prepared General and Program Records Schedules for Local Government Agencies to use when managing the records in their offices; and

WHEREAS, local governing bodies must approve such schedules before the same may be used to authorize the destruction of public records and must rely on such schedules when making decisions concerning the preservation and disposition of official records; and

WHEREAS, the Town Attorney has reviewed the current General Records Schedules for Local Government Agencies as well as the current Program Records Schedule for Local Government Agencies together with all relevant Amendments thereto and has collaborated with the appropriate town staff to supplement said schedules, where required, with specific agency policies; and

WHEREAS, the result of said collaboration are the retention schedules attached hereto as Exhibit A and Exhibit B, which the Town Attorney recommends this Council adopts; and

WHEREAS, this Council is of the opinion that it is in the best interests of the citizens and residents of The Town of Archer Lodge to approve the retention schedules attached hereto as Exhibit A and Exhibit B.

NOW, THEREFORE, BE IT RESOLVED that the Archer Lodge Town Council hereby adopts the retention schedules attached hereto.

DULY ADOPTED ON THIS 4TH DAY OF AUGUST 2025 WHILE IN REGULAR SESSION.

ATTEST:

Ben King
Deputy Town Clerk

Matthew B. Mulhollem
Mayor

RECORDS RETENTION AND DISPOSITION SCHEDULE

GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

CONTENTS

Approval	iv
Front Matter	
Executive Summary	v
Legend for Records Schedule	vii
Records Retention and Disposition Schedule	
Standard 1: Administration and Management Records	1
Standard 2: Budget, Fiscal, and Payroll Records	23
Standard 3: Geographic Information System Records	36
Standard 4: Human Resources Records	43
Standard 5: Information Technology Records	61
Standard 6: Legal Records	67
Standard 7: Public Relations Records	75
Standard 8: Risk Management Records	80
Standard 9: Workforce Development Records	86
Appendix	
Managing Public Records in North Carolina	A-1
Audits, Litigation, and Other Official Action	A-5
Transitory Records	A-6
Destruction of Public Records	A-8
Sample Destructions Log	A-10
Electronic Records: E-mail, Born Digital Records, and Digital Imaging	A-11
Geospatial Records	A-13
Security Preservation Copies of Records	A-15
Disaster Assistance	A-17
Staff Training	A-18
Request Forms	
Request for Change in Records Schedule	A-19
Request for Disposal of Unscheduled Records	A-20
Request for Disposal of Original Records Duplicated by Electronic Means	A-21
File Plan	A-22
Related Records Series in Program Schedules	A-23
Index	A-30

2021 General Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 General Records Schedule: Local Government Agencies**:

1. Administration and Management Records
2. Budget, Fiscal, and Payroll Records
3. Geographic Information System Records
4. Human Resources Records
5. Information Technology Records
6. Legal Records
7. Public Relations Records
8. Risk Management Records
9. Workforce Development Records

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

G.S. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, G.S. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends.*” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends.*” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends.*”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by this schedule; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.


Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

² Ibid.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. This schedule supersedes previous versions of this schedule and any localized amendments; it is to remain in effect from the date of approval until it is reviewed and updated.

APPROVAL RECOMMENDED


Municipal/County Clerk or Manager
Title: _____



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: _____



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

Municipality/County: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the Local Agency Program Retention and Disposition Schedules. See the appendix for Related Records Series Found in Local Agency Program Schedules.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.

- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or may include confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS**

Official records pertaining to the authority, operating philosophy, methods, primary functions, and routine office administration of local agencies.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.01	ABSTRACTS OF MUNICIPAL ELECTIONS Copies of abstracts prepared by the County Board of Elections and forwarded to the municipal clerk.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>4 Years</u> <i>Retention Note: Official record maintained permanently by the County Board of Elections.</i>	Authority: G.S. 163-300
1.02	ACCREDITATION RECORDS Records documenting accreditations and certifications received by the agency. Includes applications, final reports, and other related records. Also includes evaluations of the agency by outside entities.	Destroy in office 5 years after superseded or obsolete.	Authority: 10A NCAC 48B
1.03	ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES @ Records documenting requirements or directives promulgated by the agency for the conduct of a business or activity on agency premises or under agency authority.	Destroy in office when superseded or obsolete.	


1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.04	AUDITS: PERFORMANCE @ Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records. SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Retain in office permanently reports related to internal compliance or operational audits, hazardous material, or those that document a significant change in agency practices. b) Destroy in office PCI attestation reports after 3 years. c) Destroy in office remaining audit reports after 10 years. d) Destroy in office documentation of corrective measures 2 years after their implementation. e) Destroy in office working papers and remaining records when superseded or obsolete.	
1.05	 BLUEPRINTS AND SPECIFICATIONS @ Blueprints and specifications of agency owned buildings and facilities. Includes as-built plans and related records concerning approved changes.	a) Transfer as-built drawings to new owner when agency relinquishes ownership of building or facility. b) Retain in office as-built drawings for life of structure and then destroy. c) Destroy in office blueprints, floorplans, and other preliminary design and construction documents when superseded or obsolete.	Confidentiality: G.S. 132-1.7

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.06	<p>BONDS</p> <p>Records documenting written guarantees from a third party, including bid bonds, payment bonds, performance bonds, and surety bonds.</p> <p>SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), and Projects (below).</p>	Destroy in office 5 years after expiration or cancellation.	
1.07	<p>BULLETINS</p> <p>Internal information sharing materials that circulate information within the agency. Also includes memoranda and newsletters.</p>	Destroy in office when superseded or obsolete.	
1.08	<p>BUSINESS CERTIFICATION RECORDS</p> <p>Applications and supporting documentation submitted by businesses to be certified as a Small Business Enterprise (SBE) or other classification.</p>	<p>a) Destroy in office all documentation 3 years after most recent recertification.</p> <p>b) If certification was never issued, destroy in office all documentation when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>4 Years</u></p>	
1.09	BUSINESS DEVELOPMENT SUBJECT FILE	Destroy in office after 3 years.	
1.10	CALENDARS OF EVENTS AND APPOINTMENTS	Destroy in office when superseded or obsolete.	
1.11	<p>CENSUS PROJECT RECORDS</p> <p>Records created to assist the U.S. Census Bureau with the decennial census.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>Records are submitted to the US Census Bureau.</u></p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.12	CHARTER RECORDS Charter and charter proceedings related to adoption, amendment and/or repeal.	Retain in office permanently.	
1.13	COLLECTED DATA Information and statistics compiled and analyzed for research purposes or to support the functions of the agency. SEE ALSO: Data Warehouses (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	Destroy in office when superseded or obsolete.	If data contains confidential information, abide by relevant restrictions.

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.14	<p>CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS @</p> <p>Records concerning objections, dissatisfaction, or disagreements with actions or positions taken or not taken by the agency. Includes comments and petitions submitted by constituents requesting action as well as routine requests for service. Also includes requests for reasonable accommodation to the general public under Title II of the Americans with Disabilities Act, Housing and Urban Development Act, 1973 Rehabilitation Act, and Title VII of the Civil Rights Act of 1964; including constituent requests, survey of agency buildings to determine accessibility to the physically handicapped, proposals for implementation, correspondence (including e-mail), and resolutions.</p> <p>SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS).</p>	<p>a) Transfer records as applicable to Litigation Case Records (STANDARD 6: LEGAL RECORDS).</p> <p>b) Destroy in office comments, complaints, petitions, and requests 1 year after resolution.*</p> <p>c) Destroy in office accommodation requests 2 years after resolution.*</p>	<p>Authority: 42 USC 12132</p>
1.15	<p>CONSTITUENT SURVEYS</p> <p>Surveys and related records addressing agency services, policies, and other concerns.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after _____ 1 Year _____</p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.16	<p>CORRESPONDENCE AND MEMORANDA Administrative and management correspondence/memoranda (including e-mail) written or received by the office concerning agency authority, operating philosophy, purpose, methods, and any other function.</p> <p>For information on handling e-mail and text or instant messages, see ELECTRONIC RECORDS, page A-11. SEE ALSO: Public Bodies: Correspondence (below) and Legal Correspondence (STANDARD 6: LEGAL RECORDS).</p>	<p>a) Transfer correspondence (including e-mail) with historical value to History Records (below), after 3 years.</p> <p>b) Destroy routine administrative correspondence and memoranda after 1 year.</p> <p>c) Destroy in office remaining records after 3 years.</p> <p><i>Retention Note: The correspondence (including e-mail) of the most senior administrator has historical value and should be retained permanently.</i></p>	
1.17	<p>CUSTOMER CALL CENTER RECORDINGS @ Recordings of calls to customer service centers made for quality assurance and training purposes.</p>	Destroy in office after 30 days.	
1.18	<p>EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS @ Records concerning the maintenance, repair, routine testing, and inspection of agency owned equipment and vehicles. Also includes warranties.</p> <p>SEE ALSO: Grants (below), and System Maintenance Records: Hardware Repair or Service (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Destroy in office records documenting routine inspections, janitorial cleaning, and routine maintenance of equipment and vehicles after 1 year.*</p> <p>b) Destroy in office records documenting all other maintenance and repairs after 3 years.*</p> <p>c) Destroy in office warranties 1 year after expiration.</p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.19	<p>EQUIPMENT AND VEHICLE REFERENCE RECORDS</p> <p>Includes operation, specification, and technical manuals. Also includes brochures, bulletins, and related documentation.</p>	Destroy in office when superseded or obsolete.	
1.20	<p>EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS</p> <p>Records documenting the assignment, request, and usage of agency assets. Also includes mileage and checkout logs, fuel consumption reports, reservation requests, authorizations, utility usage logs, and similar records.</p>	<p>a) Destroy in office after 3 years if records are used for allocating costs or determining payment under rental or lease agreements.*</p> <p>b) Destroy in office remaining records after 1 year.</p>	
1.21	<p>FACILITY MAINTENANCE, REPAIR, AND INSPECTION RECORDS</p> <p>Records documenting maintenance, repair, and inspection of agency-owned facilities, including warranties on said repairs. Also includes any real property owned by the agency.</p> <p>SEE ALSO: Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS), Property Management Records (below).</p>	<p>a) Destroy in office records documenting system repair and improvement (including plumbing, electrical, fire, and other systems) after 3 years.</p> <p>b) Destroy in office records documenting routine inspections, janitorial cleaning, environmental monitoring, and routine maintenance of facilities after 1 year.</p> <p>c) Destroy in office warranties 1 year after expiration.</p>	
1.22	<p>FORMS AND TEMPLATES</p> <p>Blank forms, templates, and letterhead used to create agency records.</p>	Destroy in office when superseded or obsolete.	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.23	GRANT PROPOSALS Proposals submitted for grants, including applications, correspondence (including e-mail), and other related records.	a) Transfer records concerning approved grants to Grants (below). b) Destroy in office rejected or withdrawn grant proposals when reference value ends.± Agency Policy: Destroy in office after <u>3 Years</u>	
1.24	GRANTS[@] Records concerning approved federal, state, and private grants. File includes applications, reports, records of equipment purchased with grant funds, and all relevant programmatic records. Also includes any required certifications and disclosures, documentation about grants issued by the agency, and research records generated as part of a grant project. SEE ALSO: Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records of state and private grants 5 years after final financial report is filed.* c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed. d) Destroy in office records not relating to a specific grant after 1 year. <i>Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.</i>	Retention: 09 NCAC 03M .0703 2 CFR 200.333

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.25	HISTORICAL DESIGNATIONS RECORDS Records concerning the awarding of historical markers by the agency. Includes applications, review materials, and list of markers.	a) Retain in office permanently the list of historical markers along with the accepted applications. b) Destroy in office after 1 year rejected applications. c) Destroy in office remaining materials after 3 years.	
1.26	HISTORY RECORDS (AGENCY AND EMPLOYEES) Records concerning the history of the agency and its employees. Includes published and unpublished histories, biographical data, photographs, newspaper clippings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u>	
1.27	IMPROPER CONDUCT INVESTIGATIONS Records concerning investigations triggered by questions about ethics or conduct within an agency, such as whistleblower reports or allegations of fraud. Includes complaints, reports, investigations, and other related records. Also includes records from an ombuds office.	Destroy in office 3 years after resolution.*	
1.28	INDICES @ Listings of where specific information can be found.	Destroy in office when superseded or obsolete.	
1.29	INTERAGENCY PROGRAMS Records of programs involving more than one government agency. Includes resource materials, program information, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years after program end</u>	

1 : Administration and Management


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.30	INVENTORIES @ Inventories describing the type of property (including equipment and facilities other and fixed assets), its location, and related information. Also includes inventory control and usage records, such as requisitions/draw tickets, mileage logs, request forms, and other related records.	a) Destroy in office lists of properties, facilities, fixed assets, supplies, and surplus property when superseded or obsolete. b) Destroy in office inventory control and usage records after 3 years.	
1.31	LEGISLATION AND REGULATORY RECORDS Notices and copies of proposed or adopted state or federal legislation or regulations affecting the agency.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u> </u> obsolete or superseded	
1.32	LOGISTICS MATERIALS Records concerning scheduled plans of agency personnel and activities. Includes routine notices, task lists, and arrangements.	Destroy in office when superseded or obsolete.	
1.33	MAIL: UNDELIVERABLE/RETURNED Outgoing agency mail returned by the post office for any reason, including insufficient postage, incorrect address, forwarding order expired, etc. Also includes outgoing e-mail returned for any reason.	Destroy in office after 30 days. <i>Retention Note: If notification is necessary for a particular process, reference the relevant case file for disposition instructions (e.g., tax notifications).</i>	
1.34	 MAILING AND DISTRIBUTION RECORDS Includes mailing and meeting notification lists, e-mail distribution lists, Sunshine Lists, and related documentation of transactions with the U.S. Postal Service, state courier, or private carriers.	a) Destroy in office Sunshine Lists when superseded or obsolete. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: G.S. 132-1.12 G.S. 132-1.13

1: Administration and Management


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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.35	MEMBERSHIP RECORDS Records concerning associations, organizations, groups, etc., with which the agency is involved. Includes records concerning memberships or registrations on behalf of the agency or agency personnel.	Destroy in office when superseded or obsolete.	
1.36	MISCELLANEOUS (NON-BUILDING) APPLICATIONS, LICENSES, AND PERMITS Includes, but not limited to, applications and permits regarding free government-issued business permits, burning, special events, and landscape establishment.	a) Destroy in office 1 year after expiration of license/permit. b) Destroy in office applications for which a license/permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	
1.37	 OFFICE AND PROPERTY SECURITY RECORDS Records concerning the security of agency offices, facilities, vehicles, equipment, property, and personnel. Includes visitors' register; security, employee, or contractor access to facilities or resources; and surveillance system reports and recordings. SEE ALSO: Employee Security Records (STANDARD 8: RISK MANAGEMENT).	a) If the recording necessitates law enforcement action, transfer to the appropriate agency. b) If the recording becomes evidence in a personnel investigation or lawsuit, transfer to Disciplinary Actions (STANDARD 4: HUMAN RESOURCES RECORDS), or Litigation Case Records (STANDARD 6: LEGAL RECORDS). c) Destroy in office recordings not required to support known investigations or litigation after 30 days. d) Destroy in office remaining records after 1 year.	Confidentiality: G.S. 132-1.7

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.38	<p>ORDINANCES Includes code of ordinances.</p> <p>See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.</p>	<p>a) Retain in office official copy permanently.</p> <p>b) Destroy in office ordinance development records when ordinance is no longer in effect.</p> <p>c) Destroy in office additional copies (including tabled or failed ordinances) when reference value ends.± Agency Policy: Destroy in office after <u>Obsolete</u></p>	
1.39	<p>PEST CONTROL Records concerning pest abatement or eradication programs overseen by the agency.</p> <p>SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).</p>	Destroy in office after 3 years.*	
1.40	<p>PHONE LOGS Records documenting calls placed and received in the course of conducting agency business.</p> <p>SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Voice over Internet Protocol (VoIP) Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	Destroy in office after 1 year.	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.41	<p>POLICIES AND PROCEDURES @</p> <p>Records documenting the formulation, planning, and adoption of policies, procedures, and functions of the agency and its departments. File also includes organizational charts, reorganization studies, and similar records describing the arrangement and administrative structure of the agency.</p> <p>SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS), Electronic Records Policies and Procedures (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
1.42	<p>POLL LIST/REGISTRATION LIST/ROSTER/ AUTHORIZATION TO VOTE (ATV) @</p> <p>Lists documenting registered electors and votes cast prior to County Board of Elections taking over municipal elections. Includes electronic or paper ATV related records such as ATV books, forms, unused stickers, lists, registers, indexes, or similar records used to verify persons are registered voters at each polling location.</p>	Contact State Archives of North Carolina prior to destroying old poll books and voter registration books.	<p>Authority: G.S. 163 Art. 15A G.S. 163-166.7 08 NCAC 10B .0103 52 USC Chap. 205</p>
1.43	PRICE QUOTATIONS	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>7 Years</u>.</p>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.44	<p>PROCLAMATIONS AND ORDERS Proclamations and orders issued by the governing board.</p>	<p>a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u> Obsolete or Supersided </u></p>	
1.45	<p>PROJECTS @ Includes project correspondence (including e-mail), feasibility studies, final reports, specifications, assessments, notices to proceed, cost estimates, change orders, statements of work, and similar documentation. SEE ALSO: Project Documentation (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Retain in office records with historical value permanently. b) Destroy in office remaining records 3 years after completion of project.</p>	
1.46	<p>PROPERTY MANAGEMENT RECORDS Includes appraisals of the financial valuation of agency-owned property as well as surveys, plats, and maps. SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).</p>	<p>Destroy in office when superseded or obsolete.</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.47	<p>PUBLIC BODIES: AGENDA AND MEETING PACKETS Includes agendas and copies of supporting documentation and exhibits submitted and discussed during meetings of public bodies. Also includes documentation of outside meetings attended by agency personnel.</p> <p>SEE ALSO: Public Bodies: Minutes (below).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	
1.48	<p>PUBLIC BODIES: APPLICATIONS FOR APPOINTMENT Applications and related records received from individuals applying for appointments to serve on public boards, commissions, councils, and committees.</p>	<p>a) Destroy in office records concerning appointed individuals 1 year after expiration of term.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	
1.49	<p>PUBLIC BODIES: APPOINTMENT REPORTS Includes annual appointment reports filed with the NC Department of the Secretary of State.</p>	Destroy in office after 2 years.	Authority: G.S. 143-157.1
1.50	<p>PUBLIC BODIES: AUDIO AND VIDEO RECORDINGS OF MEETINGS</p> <p>SEE ALSO: Public Bodies: Minutes (below).</p>	<p>Destroy in office after approval of official written minutes.</p> <p><i>NOTE: If these serve as the official minutes, as allowed by G.S. 143-318.10(e), their retention should be permanent. These disposition instructions apply to recordings produced solely for the purpose of generating official written minutes.</i></p>	

1 : Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.51	<p>PUBLIC BODIES: CORRESPONDENCE Records documenting internal and external communications of governing and advisory board members. Includes correspondence (including e-mail) related to decision-making, policy development, and other high-level planning as well as logistical communications.</p>	<p>a) Transfer correspondence (including e-mail) with historical value to History Records (above), after 3 years. b) Destroy in office remaining records after 3 years.</p>	
1.52	<p>PUBLIC BODIES: MEETING NOTICES Includes notices and regular meeting schedules.</p> <p>SEE ALSO: Affidavits of Publication (STANDARD 6: LEGAL RECORDS), Publicity Records (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	<p>Destroy in office after 1 year.</p>	
1.53	<p>PUBLIC BODIES: MEMBER FILES Records concerning members of public boards, commissions, councils, and committees. Includes codes of conduct, ethics statements, agreements, notices of resignation, and other related records. Also includes biographical information and waivers.</p> <p>SEE ALSO: Oaths of Office (STANDARD 6: LEGAL RECORDS), Public Bodies: Applications for Appointment (above).</p>	<p>a) Retain in office records with historical value permanently. b) Destroy in office 1 year after superseded or obsolete waivers from board members choosing not to receive stipend/per diem payments. c) Destroy in office remaining records 1 year after service ends.</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.54	<p>PUBLIC BODIES: MINUTES Includes minutes of the governing board and all subsidiary and advisory boards. Subsidiary boards are defined as boards that exercise or are authorized to exercise legislative, policy-making, quasi-judicial, or administrative functions. Also includes minutes of subcommittees of the governing board and its subsidiary and advisory boards.</p> <p>See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.</p> <p>SEE ALSO: Ordinances (above), Public Bodies: Agenda and Meeting Packets (above), Public Bodies: Audio and Video Recordings of Meetings (above), Resolutions (below).</p>	<p>a) Retain in office permanently official minutes of the governing board and its subsidiary boards as well as all attachments necessary to understand the body's actions.</p> <p>b) The official minutes of advisory boards may be destroyed only upon approval by the State Archives of North Carolina. The State Archives reserves the right to designate the minutes of any advisory board as permanent.</p> <p>c) Destroy in office minutes of committees or subcommittees when reference value ends, if the minutes or actions and decisions of the committee are entered as part of the minutes of the parent board. If minutes or actions and decisions of the committee or subcommittee in question are not entered as part of the minutes of the parent board, the State Archives reserves the right to designate the minutes as permanent.±</p> <p>Agency Policy: Destroy in office after <u>---</u> Retain permanently</p>	<p>Authority: G.S. 143-318.10</p>
1.55	<p>RATE AND FEE SCHEDULES @ Records relating to rates, fees, and regulations concerning agency services.</p>	<p>Destroy in office when superseded or obsolete.</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.56	<p>REBATE PROGRAM RECORDS</p> <p>Applications, receipts, and related records concerning rebate programs sponsored by the agency. These records document programs and incentivized actions that residents may opt into.</p>	<p>a) Destroy in office financial records 3 years after approval.*</p> <p>b) Destroy in office applications 1 year after approval.</p> <p>c) Destroy in office denied applications when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	
1.57	<p>RECORDS MANAGEMENT</p> <p>Includes correspondence (including e-mail) with state and/or federal agencies with regards to records retention. Also includes records disposition documentation, file plans, and copies of records retention and disposition schedules.</p>	<p>a) Retain in office documentation concerning the final disposition of records permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
1.58	<p>REFERENCE (READING) FILE</p> <p>Subject files containing informational copies of records organized by areas of interest. Also includes materials that have no regulatory authority for the recipient and are received from outside the agency or from other units within the agency as well as reference copies of documents where another individual or agency is responsible for maintaining the record copy.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>Information has been retained or transferred</u></p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.59	<p>REPORTS AND STUDIES @ Records concerning the performance of a department, program, or project, as well as those created for planning purposes. Includes all annual, sub-annual, or irregularly prepared research studies, reports, and studies generated by an agency or prepared by consultants hired by the agency. Also includes reports required to be submitted to the agency.</p> <p>SEE ALSO: Accident/Incident Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Audits: Performance (above), Budget Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Civil Rights Records (STANDARD 6: LEGAL RECORDS), Financial Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Grants (above), Lost, Stolen, or Damaged Property Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Projects (above), Public Bodies: Appointment Reports (above), Strategic Plan (below), and Unemployment Compensation Reports (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Retain in office permanently 1 copy of all annual and biennial reports written by the agency.</p> <p>b) Retain in office permanently reports and studies prepared by request of an agency’s governing body or a court.</p> <p>c) Destroy in office after 3 years reports prepared monthly, bimonthly, or semi-annually.</p> <p>d) Destroy in office after 1 year activity reports concerning workload measurements, time studies, number of jobs completed, etc., prepared on a daily or other periodic basis.</p> <p>e) Destroy in office when superseded or obsolete reports required to be submitted to the agency.</p> <p>f) Destroy in office remaining reports and studies when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Year</u>.</p> <p><i>Retention Note: Reports and studies listed elsewhere in this schedule should be retained the specified period of time.</i></p>	

1: Administration and Management

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.60	<p>REQUESTS FOR INFORMATION Requests received and responses issued by the agency.</p> <p>SEE ALSO: Public Records Requests (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	Destroy in office after 1 year after resolution.	
1.61	<p>REQUESTS FOR PROPOSALS (RFP) Proposals submitted by vendors in response to requests from agency. Also includes notices and evaluations produced by the agency.</p> <p>SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Price Quotations (above).</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>7 Years</u></p>	
1.62	<p>RESOLUTIONS File consists of resolutions indicating date, issues or policy involved, and appropriate signatures.</p> <p>See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.</p>	<p>a) Retain in office permanently one copy of final resolution.</p> <p>b) Retain in office permanently resolution development records with historical value.</p> <p>c) Destroy in office additional copies of resolutions (including those tabled or failed) along with all remaining development records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>Obsolete</u></p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.63	STAFF MEETINGS FILE Records concerning meetings of internal committees, groups, or task forces along with external meetings attended by agency personnel. Includes minutes, agendas, meeting packets, visual aids, presentations, notes, recordings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 1 year.	
1.64	STRATEGIC PLAN @ Long-range plan outlining policies, guidelines, and plans for future development of the agency. Includes official copy of strategic plan and all background surveys, studies, and reports. Also includes business plans as well as mission statements, goals, and objectives.	a) Retain in office strategic plans permanently. b) Destroy in office background surveys, studies, and reports 5 years after adoption of plan. c) Destroy in office business plans 2 years after execution of plan. d) Destroy in office remaining records when superseded or obsolete.	
1.65	SURPLUS PROPERTY Inventories and reports of agency property to be surplus.	Destroy in office 3 years after disposition of property.*	
1.66	TRACKING MATERIALS Records intended to verify the receipt of information, such as certified mail receipts.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 Year</u>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.67	<p>TRAVEL REQUESTS Requests and authorizations for travel. Includes forms and itineraries.</p> <p>SEE ALSO: Price Quotations (above), Travel Reimbursements (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	Destroy in office after 1 year.*	
1.68	<p>VEHICLE REGISTRATION CARDS North Carolina registration cards for vehicles in the agency fleet.</p> <p>SEE ALSO: Vehicle Titles (STANDARD 6: LEGAL RECORDS).</p>	Destroy in office when superseded.	
1.69	<p>WORK ORDERS Includes date and location of work, cost of materials used and labor, type of work performed, and other related records regarding the repairs of equipment, facilities, and vehicles.</p>	<p>a) If this is the only record documenting completed work, follow disposition instructions for Facility Maintenance, Repair, and Inspection Records (above), or Equipment and Vehicle Maintenance, Repair, and Inspection Records (above).</p> <p>b) Destroy in office remaining records 1 year after work is completed.*</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS**

Records created and accumulated concerning the managerial control, budgeting, disbursement, collection, and accounting of the agency.

Note: Per 26 CFR 1.148-5(d)(6)(iii)(E), all records necessary to support the tax-exempt status of an agency debt issue must be retained for the life of the debt plus 3 years.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.01	ACCOUNTS PAYABLE Records concerning the status of accounts in which the agency owes money to firms or individuals. Includes invoices, reimbursements, receipts or bills of sale, check registers, and subsidiary registers. Also includes stop payment notices.	a) Destroy in office 5 years after payment documentation of reimbursement for business expenses to employees. b) Destroy in office all remaining records 3 years after payment.*	Retention: 04 NCAC 24D .0501(a)(3)(I)
2.02	ACCOUNTS RECEIVABLE @ Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.	Destroy in office 3 years after collection.*	G.S. 105A

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.03	ACCOUNTS UNCOLLECTABLE Records of accounts deemed uncollectable, including returned checks, write-off authorizations, and other related records.	Destroy in office 3 years after account is determined to be uncollectable.*	
2.04	ANNUAL BUDGET Annual budget and budget message submitted to governing board for approval. SEE ALSO: Budget Reports (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 3 years. <i>Retention Note: Annual budgets should be entered into the minutes of the governing board.</i>	Authority: G.S. 159-11
2.05	ARBITRAGE RECORDS Records concerning arbitrage rebate calculations and funds rebated.	Destroy in office 3 years after final redemption date of the bonds and after all related debts and obligations have been satisfied.*	Authority: 26 CFR 1.148-3
2.06	AUDITS: FINANCIAL @ Records concerning internal and external audits. Includes reports, working papers, and related records. SEE ALSO: Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently final reports related to internal compliance or operational audits or those that document a significant change in agency practices or have significant administrative value. b) Destroy in office after 10 years final reports related to internal accounting systems and controls and those with limited administrative value. c) Destroy in office working papers and remaining records when superseded or obsolete.*	Authority: G.S. 159-34
2.07	AUTHORIZATION FORMS Authorization to purchase materials.	Destroy in office after 3 years.*	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.08	BANK STATEMENTS AND RECONCILIATIONS Includes bank statements, canceled checks, deposit slips, and reconciliation reports.	Destroy in office after 3 years.*	
2.09	BIDS FOR DISPOSAL OF PROPERTY Records concerning the disposal of surplus property. Includes information about various disposition procedures used, such as sealed bids and public auction. SEE ALSO: Accounts Receivable (above).	Destroy in office all records after the disposition of property has been recorded in governing board's minutes.*	Authority: G.S. 153A-176
2.10	BIDS FOR PURCHASE Records documenting quotes to supply products and services. Includes advertisements, tabulations, awards letters, records of bids, good faith effort documentation, and related records concerning accepted and rejected bids.	a) Transfer records to Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS) when bid is approved. b) Destroy in office bid records not awarded or opened after 1 year.*	Authority: G.S. 143 Article 8
2.11	BOND CLOSING RECORDS Includes applications, agreements, tax records, contracts, official statements, legal opinions, rating letters, public hearing bonds, title insurance, deeds of trust, and other related records concerning bonds issued by the agency. Also includes records concerning expenditure and/or investment of bond proceeds.	Destroy in office 6 years after final maturity.*	Authority: G.S. 159 Article 7

2: Budget, Fiscal, and Payroll

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.12	BOND REGISTER Records of all bonds, notes, and coupons issued by the agency detailing the purpose of issuance, the date of issue, serial numbers (if any), denomination, maturity date, and total principal amount.	Retain in office permanently.	Authority: G.S. 159-130
2.13	BONDS, NOTES, AND COUPONS	Destroy in office 1 year from date of payment.	Authority: G.S. 159-139
2.14	BUDGET ADMINISTRATION RECORDS Records of budget administration. Includes research, correspondence (including e-mail), and other related records.	Destroy in office after 2 years.*	
2.15	BUDGET EXECUTION RECORDS Records of authorizations to move funds between budget codes.	Destroy in office when released from audits.	
2.16	BUDGET REPORTS Includes daily detail reports and monthly budget reports. Also includes contract budget and expenditure reports and summaries of tax allocations. SEE ALSO: Annual Budget (above).	a) Destroy in office daily detail reports after 1 year.* b) Destroy in office remaining reports after 3 years.*	
2.17	BUDGET REQUESTS AND WORKING PAPERS Includes budget requests, cost estimates, expenditures, program requests, salary and wage lists, correspondence (including e-mail), and related records.	Destroy in office after 3 years.*	Authority: G.S. 159-10

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.18	<p>BUDGET RESOLUTIONS AND ORDINANCES Includes project ordinances, budget resolutions, and amendments.</p> <p>SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain official copies in the minutes of the governing board.</p> <p>b) Destroy in office remaining copies when reference value ends.± Agency Policy: Destroy in office after _____ official copy is approved</p>	<p>Authority: G.S. 159-8 G.S. 159-13 G.S. 159-13.2 G.S. 159-15</p>
2.19	<p>COST ALLOCATION PLANS Accounting report that calculates and spreads agency-wide indirect costs to departments and funds that receive a service from other departments.</p>	Destroy in office after 3 years.*	
2.20	<p> CREDIT/DEBIT/PROCUREMENT CARD RECORDS Records of assignation of agency credit cards and purchasing cards along with authorization logs.</p>	Destroy in office when superseded or obsolete.*	Confidentiality: G.S. 132-1.2(2)
2.21	<p>DONATIONS AND SOLICITATIONS Records concerning requests made to agency by outside organizations. Includes applications and other related records.</p> <p>SEE ALSO: Fund Drive and Event Records (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	<p>a) Destroy in office records supporting approved donations 1 year after payment.</p> <p>b) Destroy in office rejected applications after 30 days.</p>	
2.22	<p> ELECTRONIC FUNDS TRANSFERS (EFT) Includes forms authorizing electronic transfer of monies via wire transfer or automated clearing house (ACH) as well as ACH bank reports.</p>	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 14-113.20

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.23	ESCHEATS AND UNCLAIMED PROPERTY Records containing information required to be included in holder reports submitted to the State Treasurer's office.	a) Destroy in office after 10 years if report was filed prior to July 16, 2012.* b) Destroy in office after 5 years if report was filed on or after July 16, 2012.*	Authority: G.S. 116B-60 Retention: G.S. 116B-73
2.24	FINANCIAL JOURNALS AND LEDGERS	a) Destroy in office year-end summaries of receipts and disbursements after 3 years.* b) Destroy in office daily, monthly, or quarterly transaction detail journals and ledgers after 1 year.*	
2.25	FINANCIAL REPORTS	a) Destroy in office annual financial reports or other reports generated to inform decision-making after 3 years.* b) Destroy monthly or quarterly reports generated for operational purposes after 1 year. c) Destroy logs and distribution reports generated to track transactions when released from audits.	
2.26	GOVERNMENT EMPLOYEES RETIREMENT SYSTEM MONTHLY REPORTS Reports produced by the North Carolina Department of State Treasurer regarding the Teachers' and State Employees' Retirement System (TSERS) and the Local Governmental Employees' Retirement System (LGERS).	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____ 1 Year _____	

2: Budget, Fiscal, and Payroll

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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.27	<p>GRANTS: FINANCIAL @</p> <p>Records concerning approved federal, state, and private grants received or issued by the agency. Includes all relevant accounting, purchasing, payroll, and other financial records.</p> <p>SEE ALSO: Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy records supporting the expenditure of federal funds passed through NC Dept. of Health and Human Services on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.</p> <p>b) Destroy in office records of state and private grants 5 years after final financial report is filed.*</p> <p>c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed.</p> <p>d) Destroy in office records not relating to a specific grant or to grants not funded after 1 year.</p> <p><i>Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.</i></p>	<p>Retention: 09 NCAC 03M .0703 2 CFR 200.333</p>
2.28	<p>INVESTMENTS</p> <p>Includes fund information, portfolio listings and reports, balance sheets, exchange or consent instructions, broker confirmations, notices, and other documentation related to agency investments. Also includes transaction schedules for projecting revenue on investments as well as performance investment reports issued by broker or investment firm.</p>	<p>a) Destroy in office transaction schedules after 2 years.*</p> <p>b) Destroy in office performance investment reports when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u></p> <p>c) Destroy in office all remaining records after 3 years.*</p>	<p>Authority: G.S. 159-30</p>

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.29	LOAN RECORDS Records concerning loans received by the agency. Includes documentation of intent to proceed, loan agreements, promissory notes, letters of credit, statements, notices of principal and interest due, and other related records.	Destroy in office 5 years after satisfaction or cancellation of loan.*	
2.30	LOCAL GOVERNMENT COMMISSION FINANCIAL STATEMENTS	Destroy in office after 3 years.*	Authority: G.S. 159-33
2.31	LONGEVITY PAY	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.32	 PAYMENT CARD DATA Records created in association with payment card transactions entered by third parties for the purchase of goods or services from the agency.	Destroy in office after processed.*	Confidentiality: G.S. 132-1.2(2) G.S. 132-1.10(b)(5)

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.33 	<p>PAYROLL AND EARNINGS RECORDS</p> <p>Records containing information such as the name, Social Security number, number of hours worked, compensation rate, deductions, and total wages paid each employee per payroll period. Also includes employer contributions (e.g., retirement, healthcare) along with individual and group employee earnings records and payroll registers showing earnings and deductions for each pay period.</p> <p>SEE ALSO: Payroll Deduction Records (below), Time Sheets, Cards, and Attendance Records (below); for 401(k) and other retirement plan payouts, see Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Destroy in office 30 years from date of separation records necessary for retirement or similar benefits verification.</p> <p>b) Destroy in office remaining records after 5 years.*</p>	<p>Authority: 29 CFR 516.30(a)</p> <p>Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p> <p>Retention: 04 NCAC 24D .0501(a) 29 CFR 516.5(a) 29 CFR 1627.3(a)</p>

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.34 	PAYROLL DEDUCTION RECORDS Records used to start, modify, or stop all voluntary or required deductions from payroll. Includes tax withholding (NC-4, W-4), retirement and deferred compensation, savings plans, insurance, association dues, orders of garnishment, etc. Used as proof the employee approved of the deduction(s). SEE ALSO: Payroll and Earnings Records (above), Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office tax withholding forms 4 years after termination of deduction.* b) Destroy in office authorizations for deductions for retirement contributions, bank payments, savings plans, insurance, and dues 2 years after termination of deduction. c) Destroy in office remaining records 3 years after termination of deduction.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: IRS Publication 15 29 CFR 516.6(c)(1)
2.35	POWELL BILL RECORDS Records include certified statements, expenditures reports, information sheets, financial statements submitted to the North Carolina Department of Transportation, and all other related records.	Destroy in office after 3 years.	
2.36	PURCHASE ORDERS Records, forms, packing slips, and attached documents concerning purchased supplies, equipment, and services. SEE ALSO: Grants: Financial (above).	Destroy in office after 3 years.* <i>Retention Note: Packing slips may be destroyed upon verification of items received if they are not the only record of the purchase of the item.</i>	
2.37	QUALIFIED PRODUCTS LISTS (QPL) Records identifying products approved for purchase by the agency.	Destroy in office 3 years after superseded or obsolete.*	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.38	REQUISITIONS Requests for payment or to acquire goods or services. SEE ALSO: Inventories (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office after 1 year.*	
2.39	SCHOLARSHIP RECORDS Records concerning scholarships awarded by the agency. Includes applications, award letters, conditions and stipulations, agreements and contracts, disbursement statements, progress reports, and other related records.	a) Destroy in office after 3 years records documenting the awarding of scholarships. b) Destroy in office 1 year after notification of applicant records concerning applications that are denied by the agency or awards that are declined by the recipient.	
2.40	SHIFT PREMIUM PAY Authorizations and other related records concerning employees receiving shift premium pay.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.41	STATEMENTS OF BACK PAY Forms used to determine the gross pay an employee would have earned during a specified period for back pay in a grievance decision, settlement agreement, or other order.	Destroy in office 3 years after payment.*	

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.42 	TAX FORMS Tax information returns generated by the agency (e.g., 1098, 1099, W-2, W-3) to be reported to the Internal Revenue Service and furnished to the other party to the transaction.	Destroy in office 5 years after submitted to taxpayer and/or IRS.*	Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) IRS Publication 15
2.43	TAX RETURNS Tax returns filed by the agency.	Destroy in office 6 years after filed.*	
2.44	TIME SHEETS, CARDS, AND ATTENDANCE RECORDS Records documenting the work hours and attendance of employees. SEE ALSO: Payroll and Earnings Records (above).	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a) 29 CFR 516.6(a)(1)

2: Budget, Fiscal, and Payroll


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.45	<p>TRAVEL REIMBURSEMENTS</p> <p>Includes requests and authorizations for reimbursement for travel and related expenses.</p> <p>SEE ALSO: Grants: Financial (above), Travel Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.46	<p> VENDORS</p> <p>Files maintained on specific vendors authorized or debarred from doing business with the agency. Includes name and address, correspondence (including e-mail), and other related records.</p>	Destroy in office when superseded or obsolete.	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS**

Official records received and created by agency geographic information system programs. See G.S. 132-10 for information about providing public access to GIS databases.

ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.01	<p>GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA</p> <p>Geo-referenced data and metadata to facilitate the management, manipulation, analysis, modeling, representation, and spatial analysis of complex problems regarding planning and management of resources.</p>	<p>Retain in office parcel, boundary, zoning, and orthoimagery layers (with accompanying data sets) permanently.</p> <p><i>Retention Note: Other datasets should be kept according to standards and procedures set by the North Carolina Geographic Information Coordinating Council. See also GEOSPATIAL RECORDS, page A-13.</i></p>	
3.02	<p>GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA)</p> <p>Records created during development or modification of an automated system which are necessary to access, retrieve, manipulate, and interpret data in that system; and records that explain the meaning, purpose, structure, local relationships, and origin of the data elements. Includes data element dictionaries, file layout, codebooks and tables, and definition files.</p>	<p>Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.03	<p>GEOGRAPHIC INFORMATION SYSTEM (GIS) INTERNAL STANDARDS AND PROCEDURES</p> <p>Includes requirements that are intended to make hardware, software, and data compatible and that cover data capture, accuracy, sources, base categories, output, and data element dictionaries.</p>	Retain in office permanently.	
3.04	<p>GEOGRAPHIC INFORMATION SYSTEM (GIS) MONITORING RECORDS</p> <p>Includes system security, quality assurance, transaction tracking, and other related activity monitoring records.</p>	Destroy in office after 1 year.	
3.05	<p>GEOGRAPHIC INFORMATION SYSTEM (GIS) OPERATIONAL RECORDS</p> <p>Includes user guides, system flowcharts, job or workflow records, system specifications, and similar documentation.</p>	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	
3.06	<p>GEOGRAPHIC INFORMATION SYSTEM (GIS) PROJECT RECORDS</p>	<p>a) Retain in office GIS datasets and accompanying documentation (metadata) with historical and/or legal value permanently.</p> <p>b) Destroy in office remaining items when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.07	<p>LAYERS: ADDRESS POINTS</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.08	<p>LAYERS: CORPORATE LIMITS</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.09	<p>LAYERS: EXTRATERRITORIAL JURISDICTIONS</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.10	<p>LAYERS: ORTHOIMAGERY</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Create a snapshot of dataset when created. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.11	<p>LAYERS: STREET CENTERLINE</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.12	<p>MAPPING PROJECT RECORDS</p> <p>Includes contract maps and all deliverable products for aerial photography, orthophotography, cartographic, cadastral, and digital mapping projects.</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.13	<p>MAPS: PARCEL</p> <p>Maps, including cadastral maps, and surveys of boundaries and measurements of each parcel, and information about encroachments, right-of-ways, and structures.</p> <p>See also GEOSPATIAL RECORDS, page A-13, and Property Management Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>Paper: Destroy in office upon State Archives approval.</p> <p>GIS dataset: Create a snapshot of dataset quarterly. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	
3.14	<p>MAPS: PARKS</p> <p>Includes park boundaries, facilities, landscaping, topography, and other pertinent information. Also includes maps and drawings stored and generated by Geographic Information System (GIS) and computer-aided design (CAD) systems.</p> <p>See also GEOSPATIAL RECORDS, page A-13.</p>	<p>Paper: Retain in office permanently.</p> <p>GIS dataset: Create a snapshot of dataset annually. To maintain permanently,</p> <p><i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p> <p><i>Or:</i> If retained in office permanently, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.</p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.15	<p>MAPS: ALL OTHER @</p> <p>Includes field maps, soil, topographic, sales, subdivision plats, right-of-way, sectional, highway, etc. Also includes paper maps.</p>	<p>a) Retain in office maps, including GIS datasets and accompanying documentation (metadata), with historical and/or legal value permanently.</p> <p>b) Destroy in office remaining items when reference value ends.±</p> <p><i>Retention note: Contact the State Archives of North Carolina before destroying any tax maps, watershed maps, or zoning maps.</i></p> <p>Agency Policy: Destroy in office after <u>2 years</u></p>	

3: GIS

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 4: HUMAN RESOURCES RECORDS**

Official records and materials created and accumulated incidental to the employment, qualifications, training, and pay status of agency employees. Comply with applicable provisions of G.S. 115C Article 21A (LPSUs), G.S. 122C-158 (area authorities), G.S. 130A-45.9 (public health authorities), G.S. 153A-98 (county), G.S. 160A-168 (municipal), G.S. 161E-257.2 (public hospitals), and G.S. 162A-6.1 (water and sewer authorities) regarding confidentiality of personnel records.

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.01	ABOLISHED POSITIONS Records concerning positions that have been abolished.	Destroy in office after 1 year.	
4.02	 ADMINISTRATIVE INVESTIGATIONS Records concerning the investigation of conduct problems among agency personnel. SEE ALSO: Disciplinary Actions (below).	a) Destroy in office after 3 years records concerning complaints against agency personnel that are resolved without an internal investigation. b) Destroy in office after 5 years records concerning complaints lodged against agency personnel that are exonerated. c) Destroy in office 5 years after final disposition or expiration of relevant statute of limitations complaints lodged against agency personnel that are settled out-of-court. d) Transfer investigation reports, disciplinary actions, and other related internal affairs case records to Personnel Records (Official Copy) (below).	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

4: HR


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.03 	APPLICATIONS FOR EMPLOYMENT Records submitted by job applicants for vacant positions or by current employees for promotion, transfer, or training opportunities. Includes applications, transcripts, resumes, letters of reference, and other related records.	a) Transfer applications, resumes, transcripts, and similar records as applicable to Personnel Records (Official Copy) (below) or Seasonal and Contract Worker Records (below). b) Destroy in office after 2 years unsolicited application materials from individuals hired. c) Destroy in office records concerning individuals not hired 2 years after date of receipt, if no charge of discrimination has been filed. If charge has been filed, destroy in office 1 year after resolution of charge.* d) Destroy in office 2 years after receipt unsolicited applications/resumes and those received after posted closing dates.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31
4.04	APPRENTICESHIP PROGRAM RECORDS Records concerning registered apprenticeship programs. Includes applications and selection materials as well as aggregated data. Also includes apprenticeship affirmative action plans.	Destroy in office 5 years after the making of the record or the personnel action involved, whichever occurs later.	Authority: 29 CFR 30.4(a) 29 CFR 1602.20 Retention: 29 CFR 30.12(d) 29 CFR 1602.21

4: HR


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.05 	<p>APTITUDE AND SKILLS TESTING RECORDS</p> <p>Records concerning aptitude and skills tests required of job applicants or of current employees to qualify for promotion or transfer. Includes civil service examinations.</p> <p>SEE ALSO: Employment Selection Records (below).</p>	Destroy in office after 2 years.	<p>Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p> <p>Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)(iv)</p>
4.06	<p>ASBESTOS TRAINING</p> <p>Records concerning training programs about the proper management of asbestos.</p> <p>SEE ALSO: Bloodborne Pathogen Training (below), Hazardous Materials Training Records (below).</p>	<p>a) Destroy in office employee-specific records 1 year after separation.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	<p>Retention: 29 CFR 1910.1001(m)(4)</p>

4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.07	<p>BENEFITS RECORDS</p> <p>Records concerning life, health, accident, and disability insurance plans as well as seniority and merit systems. Includes records concerning systems in which employees can select fringe benefits from a cafeteria plan, including flexible spending plans. File also includes notifications, election and claim forms, rejection letters, and other records related to COBRA (Consolidated Omnibus Budget Reconciliation Act).</p>	<p>a) Destroy in office approved claims forms after 2 years.*</p> <p>b) Destroy in office rejected requests 6 months after decision.</p> <p>c) Destroy in office 3 years after employee returns or eligibility expires notifications to employees or dependents informing them of their rights to continue insurance coverage after termination or during disability or family leave.</p> <p>d) Destroy in office remaining records 1 year after plan is terminated.</p>	Retention: 29 CFR 1627.3(b)(2)
4.08	<p>BLOODBORNE PATHOGEN TRAINING</p> <p>Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors.</p> <p>SEE ALSO: Asbestos Training (above), Hazardous Materials Training Records (below).</p>	Destroy in office after 3 years.	Retention: 29 CFR 1910.1030(h)(2)(ii)
4.09	<p>DIRECTORIES, ROSTERS, OR INDICES</p> <p>Includes records listing employees, their job titles, work locations, phone numbers, e-mail addresses, and similar information.</p>	Destroy in office when superseded or obsolete.	

4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.10	<p>DISABILITY SALARY CONTINUATION CLAIMS</p> <p>Forms used by disabled employees to apply for salary continuation benefits. Also include short-term disability claims forms and other related records.</p>	<p>a) Transfer original forms to Local Government Employees' Retirement System (LGERS) or Teachers' and State Employees' Retirement System (TSERS) for action when received.</p> <p>b) Destroy in office remaining records after 3 years.</p>	
4.11	<p>DISCIPLINARY ACTIONS</p> <p>Correspondence (including e-mail) and other records concerning disciplinary actions taken against employees by personnel or supervisory staff, including records documenting terminations. Includes records created by civil service boards when considering, or reconsidering on appeal, an adverse action against an employee.</p>	<p>a) Transfer records as applicable to Personnel Records (Official Copy) (below).</p> <p>b) Destroy in office all remaining records 2 years after resolution of all actions.</p>	<p>Authority: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p> <p>Retention: 29 CFR 1602.31</p> <p>Subject to the public information provision delineated in the above authorities.</p>



4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.12	DUAL EMPLOYMENT Records concerning employees' requests and authorizations to accept employment with another local government agency. SEE ALSO: Secondary Employment (below).	a) Destroy in office approved requests and related records 1 year after employee terminates additional employment. b) Destroy in office denied requests and related records after 6 months.	
4.13	 EDUCATIONAL LEAVE AND REIMBURSEMENT Includes records requesting educational leave and tuition assistance, reimbursements, and other related records. SEE ALSO: Leave Records (below).	a) Transfer records documenting approved leave requests to Personnel Records (Official Copy) (below). b) Destroy in office records concerning denied requests 6 months after denial.* c) Destroy in office records concerning approved tuition reimbursements 3 years after reimbursement.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.14	 EMPLOYEE ASSISTANCE PROGRAMS Records documenting assistance and counseling opportunities. Includes requests for information, referrals, forms, releases, correspondence, and other related records.	Destroy in office after 3 years.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1



4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.15 	EMPLOYMENT ELIGIBILITY RECORDS Includes the I-9 forms, employment authorization documents filed with the U.S. Department of Labor, petitions filed by the agency, E-Verify documentation, and Selective Service Registration compliance forms.	a) I-9 forms have mandatory retention throughout the duration of an individual's employment. After separation, destroy records in office 3 years from date of hire or 1 year from separation, whichever occurs later. b) Destroy in office after 5 years employment authorization documents filed with the U.S. Department of Labor. c) Destroy in office immigrant or nonimmigrant petitions filed by the agency 3 years after employee separation. d) Destroy in office remaining records 1 year after employee separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 8 USC 1324a(b)(3)
4.16 	EMPLOYMENT SELECTION RECORDS Records concerning the selection of applicants for vacant positions or of current employees for promotion, transfer, or training opportunities. Includes interview documentation, rosters, eligibility lists, test ranking sheets, justification statements, background and criminal history checks, and similar records. SEE ALSO: Applications for Employment (above), Aptitude and Skills Testing Records (above).	a) Destroy in office background and criminal history checks after 5 years. b) Destroy in office remaining records 2 years after hiring decision.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)

4: HR



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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.17 	EXIT INTERVIEW RECORDS Includes feedback from employees planning to separate from the agency.	Destroy in office after 1 year.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.18 	FAMILY MEDICAL LEAVE ACT (FMLA) RECORDS Records concerning leave taken, premium payments, employer notice, medical examinations considered in connection with personnel action, disputes with employees over FMLA, and other related records. SEE ALSO: Leave Records (below).	Destroy in office 3 years after leave ends.*	Authority: 29 CFR 825.110 Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 825.500(b)

4: HR


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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.19 	<p>GRIEVANCES Includes initial complaint by employee, investigation, action, summary, and disposition.</p> <p>SEE ALSO: Disciplinary Actions (above), Personnel Records (Official Copy) (below).</p>	Destroy in office after 2 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.20	<p>HAZARDOUS MATERIALS TRAINING RECORDS Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors. May also include documentation of loans of radioactive materials for the purpose of training exercises.</p> <p>SEE ALSO: Asbestos Training (above), Bloodborne Pathogen Training (above).</p>	Destroy in office after 5 years.	Authority: 29 CFR 1910.120(p)(8)(iii) 10A NCAC 15
4.21	<p>INTERNSHIP PROGRAM Records concerning interns and students who work for the agency.</p>	Destroy in office after 2 years.	
4.22	<p>LAW ENFORCEMENT TRAINING Records concerning internal training for law enforcement personnel.</p>	Retain in office permanently.	

4: HR



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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.23 	LEAVE RECORDS Records concerning employee leave, including requests for and approval of sick, vacation, overtime, buy-back, shared, donated, etc. Also includes records documenting leave without pay. SEE ALSO: Educational Leave and Reimbursement (above), Family Medical Leave Act (FMLA) Records (above), Military Leave (below).	a) Destroy in office approved requests 3 years after return or separation of employee.* b) Destroy in office denied requests after 6 months.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.24 	MEDICAL RECORDS Records for employees, contractors, and volunteers concerning asbestos, toxic substances, and bloodborne pathogen exposure; physical examinations required by the employer in connection with any personnel action, including health or physical examination reports, or certificates created in accordance with the Americans with Disabilities Act (ADA); and records of injury or illness. (Does not include worker's compensation or health insurance claim records.) SEE ALSO: Benefits Records (above), Workers' Compensation Program Claims (below).	a) Destroy in office exposure records 30 years after date of exposure.* b) Destroy in office records pertaining to first-aid job-related illness and injury after 5 years. c) Provide medical records to employees who have worked for less than 1 year at time of separation. d) Destroy in office after 1 year records concerning physical examinations or health certificates. e) Destroy in office remaining records 30 years after employee separation. <i>Retention Note: Records must be maintained separately from an employee's personnel jacket. If part of a worker's compensation claim, follow disposition for Workers' Compensation Program Claims (below).</i>	Authority: 29 CFR 1910.1020(e) Confidentiality: 29 CFR 1630.14(c)(1) 29 CFR 1910.1030(h)(1)(iii) Retention: 29 CFR 1627.3(b)(1)(v) 29 CFR 1910.1020(d) 42 USC 12112(d)(3)

4: HR


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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.25	<p>MILITARY LEAVE</p> <p>Records concerning military leave, as established by the Uniformed Services Employment and Reemployment Rights Act (USERRA).</p> <p>SEE ALSO: Leave Records (above).</p>	Destroy in office 3 years after leave ends or employee separates from agency.*	Authority: 5 CFR 1208
4.26	<p> PERFORMANCE REVIEWS</p> <p>Information used to establish employees' goals and primary tasks. Records used to evaluate each employee's work performance.</p> <p>SEE ALSO: Personnel Records (Official Copy) (below).</p>	Destroy in office after 3 years.	Confidentiality (applies only to performance evaluations): G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 60A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.27	<p>PERSONNEL ACTION NOTICES</p> <p>Records used to create or change information in the personnel records of individual employees concerning such issues as hiring, termination, transfer, pay grade, and position or job title.</p>	Transfer records to Personnel Records (Official Copy) (below).	Subject to the public information provision delineated in relevant General Statutes.

4: HR



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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.28 	PERSONNEL RECORDS (OFFICIAL COPY) Official copy of personnel file maintained on each permanent and temporary agency employee that is eligible for benefits. Includes basic employee information and records and forms relating to the selection or non-selection, promotion, transfer, leave, salary, suspension, and termination of employment. Note: For agencies responsible for maintaining personnel files for criminal justice officers, please consult 12 NCAC 09C .0307 for the mandatory records of certification that must be housed in the personnel file. SEE ALSO: Medical Records (above), Seasonal and Contract Worker Records (below).	a) Destroy in office after 30 years from date of separation information needed to document: date and amount of each increase or decrease in salary with that agency; date and type of each promotion, demotion, transfer, suspension, separation, or other change in position classification with that agency; date and general description of the reasons for each promotion with that agency; date and type of each dismissal, suspension, or demotion for disciplinary reasons taken by the agency; and, if the disciplinary action was a dismissal, a copy of the written notice of the final decision of the agency setting forth the specific acts or omissions that are the basis of the dismissal. b) Destroy in office information necessary to verify benefits 30 years after date of separation. c) Destroy in office remaining records when individual retention periods are reached as noted in individual items in this Records Retention and Disposition Schedule.	Authority/ Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.29 	PERSONNEL RECORDS (SUPERVISOR COPY) Personnel jacket that is often maintained by supervisors.	a) Transfer records as applicable to Personnel Records (Official Copy) (above). b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u>	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

4: HR


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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.30	<p>POLICIES AND PROCEDURES (PERSONNEL) Official internal agency personnel policies and procedures. Also includes agreements and authorizations required of employees, orientation materials, and informational data.</p> <p>SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), and Workers' Compensation Program Administration (below).</p>	<p>a) Retain in office internal agency personnel policies and procedures permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
4.31	<p> POLYGRAPH RECORDS Includes statements informing employee of the time, place, and reasons for the test; copy of notice sent to examiner identifying employee to be tested; and copies of opinions, reports, or similar records generated by the examiner and provided to the agency.</p>	<p>Destroy in office 3 years from the date the test was given, or from the date the test was requested if no examination was given.</p>	<p>Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1</p> <p>Retention: 29 CFR 801.30</p>

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.32	<p>POSITION CLASSIFICATION, CONTROL, AND HISTORY Records concerning personnel actions and position control, status of each established permanent, temporary full-time, or part-time position, and other related topics. Also includes listings providing classification, titles, and position numbers.</p> <p>SEE ALSO: Position Descriptions (below).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
4.33	<p>POSITION DESCRIPTIONS Includes information on job title, grade, duties, agency assigned, and responsibilities.</p>	Destroy in office 2 years after superseded.	Retention: 29 CFR 1620.32
4.34	<p>POSITION EVALUATIONS Forms used to evaluate the primary purpose of a position.</p>	Destroy in office after 1 year.	
4.35	<p>RECRUITMENT RECORDS Includes ads and notices of overtime, promotion, and training. Also includes employment listings.</p>	Destroy in office 1 year from date of record.	Retention: 29 CFR 1627.3(b)

4: HR


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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.36	<p>RETIREMENT RECORDS</p> <p>Includes descriptive information about retirement systems along with plans and related records outlining the terms of employee pension and other deferred compensation plans, including 401(k).</p> <p>SEE ALSO: Payroll and Earnings Records; Payroll Deduction Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	<p>a) Destroy in office descriptive information about retirement plans 1 year after plan is terminated.</p> <p>b) Destroy in office records concerning employer-sponsored retirement plans 7 years after payment.*</p> <p>c) Transfer Local Governmental Employees' Retirement System (LGRS) forms to Department of State Treasurer.</p> <p>d) Transfer applicable records to Personnel Records (Official Copy) (above).</p>	Retention: 29 CFR 1627.3(b)(2)
4.37	<p> SEASONAL AND CONTRACT WORKER RECORDS</p> <p>Records concerning seasonal or contractual employees who are not provided with or eligible for benefits.</p> <p>SEE ALSO: Personnel Records (Official Copy) (above).</p>	Destroy in office 5 years after date of separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.38	<p>SECONDARY EMPLOYMENT</p> <p>Records concerning employees' requests and authorizations to accept employment with a private entity.</p> <p>SEE ALSO: Dual Employment (above.)</p>	<p>a) Destroy in office approved requests and related records 1 year after employee terminates outside employment.</p> <p>b) Destroy in office denied requests and related records after 6 months.</p>	

4: HR

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	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.39	<p>SERVICE AWARDS AND COMMENDATIONS Includes award and selection committee reports, nominations, selection criteria, and similar administrative records relating to employee recognition or incentive programs.</p> <p>SEE ALSO: Personnel Records (Official Copy) (above).</p>	Destroy in office 2 years from date of record creation or the personnel action involved.	
4.40	<p>SUGGESTIONS AND SURVEYS Recommendations and feedback submitted by agency employees.</p>	Destroy in office after 1 year.	
4.41	<p>TRAINING AND EDUCATIONAL RECORDS Records concerning the delivery of training to agency personnel. Includes training manuals, syllabi and course outlines, and other related records. Also includes employee-specific records (certificates, transcripts, test scores, etc.) relating to the training, testing, or continuing education of employees.</p> <p>SEE ALSO: Conferences and Workshops (STANDARD 7: PUBLIC RELATIONS RECORDS), Educational Leave and Reimbursement (above). Other required trainings are handled in Asbestos Training (above), Bloodborne Pathogen Training (above), Hazardous Materials Training Records (above), Law Enforcement Training (above).</p>	<p>a) Transfer records as applicable to Personnel Records (Official Copy) (above), if such training and testing is required for the position held or could affect career advancement.</p> <p>b) Destroy in office certifications and other qualifications 5 years after expiration or employee separation.</p> <p>c) Destroy in office general training materials when superseded or obsolete.</p> <p>d) Destroy in office remaining employee-specific records after 1 year.</p>	Retention: 29 CFR 1627.3(b)(1)(iv)

4: HR


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.42 	UNEMPLOYMENT COMPENSATION CLAIMS Claim forms and other related records concerning unemployment compensation cases.	Destroy in office after 5 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a)
4.43	UNEMPLOYMENT COMPENSATION REPORTS Quarterly reports showing month-to-date wages, month-to-date compensation, year-to-date wages, and year-to-date compensation for each employee. May be filed with NC Division of Employment Security.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
4.44	UNEMPLOYMENT INSURANCE Forms submitted to the Department of Commerce to report wage records of terminated employees.	Transfer to the N.C. Department of Commerce, Division of Employment Security.	
4.45	VERIFICATION OF EMPLOYMENT RECORDS Inquiries and responses concerning verification of an employee's prior or current employment with the agency.	Destroy in office after 1 year.	
4.46	VOLUNTEER RECORDS Records concerning individuals who volunteer to assist with various agency activities.	Destroy in office 2 years after completion of assignment.	


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.47	WORK SCHEDULES AND ASSIGNMENTS Records concerning work, duty, shift, crew, or case schedules, rosters, or assignments.	Destroy in office after 1 year.	
4.48	WORKERS' COMPENSATION PROGRAM ADMINISTRATION Includes program policies, guidelines, and related administrative documentation.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.49	 WORKERS' COMPENSATION PROGRAM CLAIMS Records concerning workers' compensation claims filed by employees' supervisors concerning accidental injuries or illnesses suffered on the job. Includes Employer's Report of Injury to Employee (Form 19), accident investigation reports, medical reports, claim cost reports, reference copies of medical invoices, and other related records. <i>Note: All official copies of claims records should be transferred to the North Carolina Industrial Commission in compliance with G.S. 97-92(a).</i>	Destroy in office agency's working file for workers' compensation claims by its employees 5 years after employee returns to work or separates from agency.*	Confidentiality: G.S. 8-53 G.S. 97-92(b)

4: HR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 5: INFORMATION TECHNOLOGY (IT) RECORDS**

Information technology encompasses all activities undertaken by agency to design, develop, and operate electronic information systems. This section covers records for which Information Technology personnel are responsible, including administrative records and those used to process data and monitor and control operations.


Note: Administration, use, and retention of records concerning computer and information security should comply with applicable provisions of G.S. 132-6.1 on the confidentiality of records regarding "hardware or software security, passwords, or security standards, procedures, processes, configurations, software, and codes." (G.S. 132-6.1 (c))

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.01 	AUDITS: IT SYSTEMS Records documenting user actions affecting the contents of monitored systems. Also includes fixity checks and other periodic tests of data validity.	a) Destroy in office 1 year after superseded or obsolete fixity check documentation. b) Destroy in office remaining records after disposition of record.*	Confidentiality: G.S. 132-6.1(c)
5.02	COMPUTER AND NETWORK USAGE RECORDS Records documenting usage of electronic devices and networks. Includes login files, system usage files, individual program usage files, and records of use of the Internet by employees.	Destroy in office after 1 year.	
5.03	DATA DOCUMENTATION RECORDS Records concerning data in automated systems. Includes data element dictionary, file layout, code book or table, entity relationships tables, and other records related to the structure, management, and organization of data.	Destroy in office 3 years after system is discontinued and/or replaced.	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.04	<p>DATA MIGRATION RECORDS Technical records documenting data migrations.</p> <p><i>Note: The data itself is subject to the disposition instructions indicated for its relevant records series; these are merely records about migrating said data.</i></p>	Destroy in office 1 year after completion of data migration.	
5.05	<p>DATA WAREHOUSES Federated data gathered by the agency from other sources for the purposes of comparison and distribution.</p> <p>SEE ALSO: Collected Data (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office when superseded or obsolete.	Maintain confidentiality consistent with any restrictions placed on the data provider.
5.06	<p>DIGITIZATION AND SCANNING RECORDS Records concerning data entry and imaging operations. Includes quality control records.</p> <p>See also REQUEST FOR DISPOSAL OF ORIGINAL RECORDS DUPLICATED BY ELECTRONIC MEANS, page A-21.</p>	<p>Destroy in office 10 days after digitization.</p> <p><i>Note: The digital surrogate becomes the record copy and must be retained according to the disposition instructions for that record type.</i></p>	
5.07	<p>ELECTRONIC RECORDS POLICIES AND PROCEDURES Includes procedural manuals as well as an Electronic Records and Imaging Policy and a Security Backup Policy.</p> 	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.7(b) G.S. 132-6.1(c)

5:11

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES


ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.08	INFORMATION TECHNOLOGY ASSISTANCE RECORDS Records documenting troubleshooting and problem-solving assistance provided by agency information systems personnel to users of the systems. Includes help desk assistance requests, resolution records, and related documentation.	Destroy in office 1 year after work is completed.	
5.09 	NETWORK AND SYSTEM SECURITY RECORDS Records documenting cybersecurity efforts. Includes records concerning firewalls, anti-virus programs, intruder scanning logs, and other related records.	a) Destroy in office finalized cyber incident reports 5 years after resolution. b) Destroy in office after 2 years records documenting incidents involving unauthorized attempted entry or probes on data processing systems, IT systems, telecommunications networks, and electronic security systems. c) Destroy in office after 1 year records concerning firewalls, anti-virus programs, and other related records.	Confidentiality: G.S. 132-6.1(c)
5.10 	NETWORK DIAGRAMS Records documenting the logical and physical relationships of network components for purposes of organization, deployment, troubleshooting, monitoring of access, and management of day-to-day operations.	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-6.1(c)

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.11	<p>PROJECT DOCUMENTATION</p> <p>Records created to design, develop, control, or monitor a specific project or group of IT projects. Includes statements of work, assessments, maintenance agreements, and testing records.</p> <p>SEE ALSO: Projects (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office permanently records with historical value.</p> <p>b) Destroy in office remaining records 3 years after completion of project.</p>	
5.12	<p>SOFTWARE LICENSE AND COPYRIGHT PROVISIONS RECORDS</p> <p>Records documenting compliance with agency software license and copyright provisions. Includes software licenses, correspondence (including e-mail), and related documentation.</p>	Destroy in office 1 year after software is superseded or obsolete.	
5.13	<p>SYSTEM ACCESS RECORDS</p> <p>Records documenting access requests and authorizations, system access logs, and other related records.</p>	Destroy in office 1 year after superseded or obsolete.	
5.14	<p> SYSTEM DOCUMENTATION RECORDS</p> <p>Records documenting operating systems, application programs, structure and form of datasets, system structure, and system-to-system communication. Includes system overviews, dataset inventories, server name, IP address, purpose of the system, vendor-supplied documentation, installed software, and current source code.</p>	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.1(g) G.S. 132-6.1(c)

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.15	<p>SYSTEM MAINTENANCE RECORDS: HARDWARE REPAIR OR SERVICE</p> <p>Records documenting inspections, maintenance, and repairs of agency computer systems that are owned or leased. Includes computer equipment inventories and service records.</p> <p>SEE ALSO: Equipment and Vehicle Maintenance, Repair, and Inspection Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy in office records documenting routine inspections and maintenance of equipment after 1 year.</p> <p>b) Destroy records documenting all other equipment maintenance and repairs upon the final disposition of the equipment.</p>	
5.16	<p>SYSTEM MAINTENANCE RECORDS: RECORDS BACKUPS</p> <p>Records documenting regular or essential system backups. Includes backup tape inventories, relevant correspondence (including e-mail), and related documentation.</p> <p>See also Security Backup Files as Public Records in North Carolina: Guidelines for the Recycling, Destruction, Erasure, and Re-use of Security Backup Files, available on the State Archives of North Carolina website.</p>	<p>Destroy in office in accordance with your office's established, regular backup plan and procedures.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	
5.17	<p>TECHNICAL PROGRAM DOCUMENTATION</p> <p>Records concerning program code, program flowcharts, program maintenance logs, systems change notices, and other related records that document modifications to computer programs.</p>	<p>Destroy in office 1 year after superseded or obsolete.</p>	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.18	<p>VOICE OVER INTERNET PROTOCOL (VoIP) RECORDS Records concerning line registrations, calls logs, and voicemail records.</p>	<p>a) Destroy in office records concerning line registration when superseded or obsolete.</p> <p>b) Destroy in office call logs after 1 year.</p> <p>c) Destroy in office voicemail records after 30 days.</p>	
5.19	<p>WEB MANAGEMENT AND OPERATIONS RECORDS: STRUCTURE Site maps that show the directory structure into which content pages are organized, and commercial, off-the-shelf software configuration or content management system files used to operate the site and establish its look and feel. Includes server environment configuration specifications.</p> <p>SEE ALSO: Website (Electronic) (STANDARD 7: PUBLIC RELATIONS RECORDS).</p>	<p>Destroy in office when superseded or obsolete.</p>	

5: IT

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 6: LEGAL RECORDS**

Official documentation created or accumulated to substantiate the rights, obligations, or interests of the agency or their individual employees or clients. Please note the confidentiality that G.S. 132-1.1(a) confers to communications by legal counsel expires three years after receipt of such communication.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.01	<p>AFFIDAVITS OF PUBLICATION Proof of publication provided by newspapers regarding publication of ordinances, public hearings, bid solicitations, payment of bills, public sales, etc.</p> <p>SEE ALSO: Public Bodies: Meeting Notices (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office permanently if record provides sole evidence of publication.</p> <p>b) Destroy in office remaining records after 3 years.*</p>	Authority: G.S. 1-600
6.02	<p>ANNEXATION RECORDS Records concerning annexation of property into the city. Includes petitions, reports, correspondence (including e-mail), maps, ordinances, and public hearings.</p>	<p>a) Destroy in office withdrawn petitions after 1 year.</p> <p>b) Retain remaining records in office permanently.</p> <p><i>Retention Note: Annexation maps and ordinances must be filed with the County Register of Deeds office and the office of the Secretary of State (G.S. 160A-29, G.S. 160A-58.61 and G.S. 160A-58.90). A map must also be filed with the county board of elections (G.S. 163-288.1).</i></p>	
6.03	<p>AUTHENTICATIONS Certificates of authentication issued by the agency.</p>	Retain in office permanently.	

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.04	<p>CIVIL RIGHTS CASE RECORDS Records concerning discrimination complaints by employees or former employees and employee requests for reasonable accommodation. Includes equal opportunity (EO) complaints.</p> <p>SEE ALSO: Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Personnel Records (Official Copy) (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Destroy in office requests for reasonable accommodation 2 years after they become obsolete.</p> <p>b) Destroy in office discrimination complaints 1 year after final disposition of the charge or the action.*</p> <p><i>Retention Note: 29 CFR 1602.14 defines final disposition of the charge or the action as "the date of expiration of the statutory period within which the aggrieved person may bring an action in a U.S. District Court or, where an action is brought against an employer either by the aggrieved person, the Commission, or by the Attorney General, the date on which such litigation is terminated."</i></p>	<p>Retention: 29 CFR 1602.14 29 CFR 1602.31</p>

6. Legal

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.05	<p>CIVIL RIGHTS RECORDS</p> <p>Records concerning documentation of personnel policies and procedures to comply with the Age Discrimination in Employment Act (ADEA), the Americans with Disabilities Act (ADA), the Equal Pay Act, the Genetic Information Nondiscrimination Act (GINA), Section 504 of the 1973 Rehabilitation Act, and the 1964 Civil Rights Act. Includes reports required by the Equal Employment Opportunity (EEO) Commission and affirmative action plans.</p> <p>SEE ALSO: Civil Rights Case Records (above), Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	Destroy in office 3 years after superseded or obsolete.	<p>Authority: 29 CFR 1602.1 29 CFR 1602.7 29 CFR 1608.4</p> <p>Retention: 29 CFR 1602.30 29 CFR 1602.32 34 CFR 104.6(c)(2)</p>
6.06	<p>CONDEMNATION RECORDS</p> <p>Settled and pending condemnation cases.</p> <p>SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records.</p>	Retain in office permanently.	

6: Legal

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.07	<p>CONFLICT OF INTEREST AND CONFLICT OF COMMITMENT DISCLOSURE STATEMENTS</p> <p>Completed by the elected agency officials as well as designated staff members in order to disclose an official's status or ownership interests.</p>	Destroy in office 1 year after completion of term or separation.	
6.08	<p>CONTRACTS, LEASES, AND AGREEMENTS @</p> <p>Contracts and agreements for construction, equipment, property, supplies, special programs, and projects. Includes franchise agreements, hold harmless agreements, good faith effort documentation, contractor compliance monitoring, leases, and memoranda of understanding.</p> <p>SEE ALSO: Software License and Copyright Provisions Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Retain in office contracts and agreements with historical value permanently.</p> <p>b) Destroy in office sealed contract records 10 years after expiration of contract.*</p> <p>c) Destroy in office all records related to capital improvement contracts and business associate agreements 6 years after completion, termination, or expiration.*</p> <p>d) Destroy in office records documenting restrictions and compliance with license and copyright provisions for products and services purchased by the agency 1 year after superseded or obsolete.*</p> <p>e) Destroy in office all other contracts and agreements 3 years after completion, termination, or expiration.*</p>	<p>Retention: G.S. 1-47(2) G.S. 1-50(a)(5) 45 CFR 164.316 G.S. 1-52</p>
6.09	<p>DECLARATORY RULINGS</p> <p>Records concerning declaratory rulings issued by the agency to interpret statutes or rules as applied to a specified set of facts.</p>	Retain in office permanently.	

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.10	<p>DELEGATION OF AUTHORITY RECORDS Records documenting delegations of power to authorize agency business. Includes signature authorities and powers of attorney.</p>	Destroy in office 1 year after superseded or obsolete.	
6.11	<p>EASEMENTS AND RIGHT-OF-WAY AGREEMENTS Granted to the agency.</p> <p>SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records; LOCAL PROGRAM SCHEDULE, Excavation Permits and Right-of-Way Acquisition Working Records (STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS).</p>	Destroy in office 10 years after expiration of agreement.	
6.12	<p>ENCROACHMENTS Records concerning agreements granted by or to the agency. Also includes maps or drawings detailing construction plans attached to agreements.</p>	<p>a) Retain in office permanently records concerning agreements granted by outside entities to the agency.</p> <p>b) Destroy in office when superseded or obsolete records concerning agreements granted to utilities, businesses, and private residents to encroach upon agency property.</p>	
6.13	<p>EXPUNCTIONS Expunction orders received by local agencies.</p>	Destroy in office when record is expunged.	



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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES


ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.14	INVESTIGATION AND HEARING RECORDS Records concerning complaints, fraud allegations, contestments, grievances, and inquiries against individuals and other entities. Includes summaries, charges, reports, assessments and findings, hearing transcripts and evidence, decisions and sanctions, referrals, correspondence, and other related records.	Destroy in office 3 years after completion.*	
6.15	LAND OWNERSHIP RECORDS Includes deeds and titles.	Destroy in office 1 year after agency relinquishes ownership of land.*	
6.16	 LEGAL CORRESPONDENCE Correspondence (including e-mail) and related records concerning legal matters not related to specific legal cases or official opinions.	Destroy in office after 5 years. For information on handling e-mail, see ELECTRONIC RECORDS , page A-11.	Confidentiality: G.S. 132-1.1(a)
6.17	LEGAL OPINIONS Formal legal opinions written by counsel in response to requests concerning the governance and administration of the agency.	Retain in office permanently.	
6.18	 LEGAL REVIEW RECORDS Includes legal reviews of by-laws and charges to boards and commissions, conflicts of interest, and all other agency matters as requested. SEE ALSO: Legal Opinions (above).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a)

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.19 	LITIGATION CASE RECORDS Civil suits to which the agency is a party. Includes affidavits, agreements, appeals, bills, briefs, citations, commitments, complaints, discharges, motions, notices, pleas, releases, statements, testimony, verdicts, waivers, warrants, and writs.	a) Retain in office cases having precedential or historical value permanently. b) Destroy in office adjudicated cases 6 years after final disposition. c) Destroy in office non-adjudicated cases (out-of-court claims) 6 years after final disposition or expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a) G.S. 132-1.9
6.20	OATHS OF OFFICE SEE ALSO: Public Bodies: Member Files (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Transfer official copy of oath of office to the municipal clerk or the county clerk to the board of commissioners or the clerk of the governing board for permanent retention. <i>Retention Note: The Clerk should present a copy of the oaths of elected officials to the Clerk of Superior Court for recording.</i>	Authority: G.S. 105-349 G.S. 153A-26 G.S. 160A-61 G.S. 160A-68 G.S. 160A-284 Retention: G.S. 7A-103(2)
6.21	PERMISSIONS Records conferring legal permission. Includes copyright permission requests and requests for permission to publish intellectual property or holdings of the agency. Also includes copyrights, patents, and trademarks held by the agency.	a) Retain in office permanently records conferring perpetual legal permission as well as records documenting copyrights, patents, and trademarks held by the agency. b) Destroy in office 3 years after expiration records concerning one-time copyright permissions granted by the agency.	

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± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.22	PRE-TRIAL RELEASE PROGRAM RECORDS Records documenting supervision for defendants who do not pose a risk to the community as they await trial.	Destroy in office 3 years after trial.	
6.23	RELEASE FORMS Records documenting consent and waiving the individual's right to hold the agency responsible for injuries or damages occurring while voluntarily participating in events or activities.	Destroy in office 5 years after termination of release/waiver.	
6.24	SETTLEMENTS Records concerning pre-litigation or informal settlements.	Destroy in office 10 years after expiration.	Authority: G.S. 132-1.3
6.25	VEHICLE TITLES Titles of agency owned vehicles.	Dispose of in accordance with Division of Motor Vehicles procedures for title transfer upon disposition of vehicle.	Authority: G.S. 20-72

6: Legal

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 7: PUBLIC RELATIONS RECORDS**

Official records and materials created and accumulated by internal public relations programs operated by the agency.

ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.01	<p>AGENCY PUBLICATIONS</p> <p>Publications created at agency expense. Also includes correspondence and other related records regarding the design and creation of agency publications.</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy publications management records after 5 years.</p> <p>c) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	
7.02	<p>AUDIO-VISUAL RECORDINGS @</p> <p>Recordings (including digital) and films produced by or for the agency. This does not include recordings of public meetings or security videos.</p> <p>SEE ALSO: Public Bodies: Audio and Video Recordings of Meetings (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	
7.03	<p>COMMUNITY AWARDS @</p> <p>Records concerning awards by the agency recognizing community contributions.</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>5 Years</u></p>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.04	<p>CONFERENCES AND WORKSHOPS @</p> <p>Records concerning conferences and workshops conducted by agency employees. Includes slides, charts, transparencies, handouts, and other related records used in presentations.</p> <p>SEE ALSO: Training and Educational Records (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
7.05	<p>EDUCATIONAL MATERIALS</p> <p>Materials produced for usage by teachers or tour groups. Includes lesson plans, activities, and other related records.</p>	<p>Destroy in office when superseded or obsolete.</p>	
7.06	<p>FUND DRIVE AND EVENT RECORDS</p> <p>Records documenting the promotion and organization of fund drives and other special events in which the agency participated. Includes records concerning solicitations requesting and donations providing money or in-kind donations for agency programs. Also includes invitations, registration materials, agendas, handouts, presentations, and programs.</p> <p>SEE ALSO: Donations and Solicitations (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	

7: PR

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.07	INVITATIONS Invitations sent and received concerning agency and external functions.	Destroy in office after event occurs.	
7.08	MEDIA FILE Reference copies of newspaper, magazine, and other media clippings concerning the agency, agency officials, and other topics of interest.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>5 Years</u>	
7.09	POPULAR ANNUAL FINANCE REPORT Comprehensive annual financial report (CAFR)	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
7.10	PUBLIC HEARINGS Includes agendas, minutes, notices, speaker sign-up sheets, and similar documentation. SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office minutes permanently. b) Destroy in office remaining records after 1 year.	

7: PR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.11	<p>PUBLIC RECORDS REQUESTS</p> <p>Formal requests submitted by persons seeking access to agency records along with documentation of agency response.</p>	<p>Destroy in office 2 years after resolution.*</p> <p><i>Note: These disposition instructions apply only to the request, internal agency records related to searching for and preparing responsive records, and communication of response; the documents that are responsive to public records requests should be handled according to their respective disposition instructions. However, if the agency also retains separate copies of the documents that are responsive to public records requests, they may also be destroyed 2 years after completion of the request.</i></p>	
7.12	<p>PUBLICITY RECORDS @</p> <p>Records concerning overall public relations of agency. Includes advertisements, announcements, correspondence (including e-mail), photographic materials, news and press releases, and other related records.</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.*</p>	
7.13	<p>SOCIAL MEDIA</p> <p>SEE ALSO: Website (Electronic) (below).</p>	<p>See APPENDIX (page A-12) for guidance in handling social media.</p>	
7.14	<p>SPEECHES</p> <p>Speeches made by agency officials.</p>	<p>a) Retain in office records with historical value permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 Year</u></p>	

7: PR

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.15	<p>WEBSITE (ELECTRONIC) Records created and maintained in paper and electronic formats concerning the creation and maintenance of the agency's presence on the World Wide Web. Includes correspondence (including e-mail), procedures, instructions, website designs, HTML/XHTML, or other web-based file formats, and other related records.</p> <p>SEE ALSO: Web Management and Operations Records: Structure (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).</p>	<p>a) Capture website annually or whenever a major revision in design and/or content has taken place, whichever occurs first. Retain captured content in office permanently. Can be maintained as website snapshots or via Web crawler.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	

7: PR

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STANDARD 8: RISK MANAGEMENT RECORDS

Official records created and accumulated to manage risks in the agency.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.01	ACCIDENT/INCIDENT REPORTS (CUSTOMER AND EMPLOYEE) SEE ALSO: Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Transfer records resulting in workers' compensation to Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS). b) Destroy in office remaining employee claims 3 years after settlement or denial of claim.* c) Destroy in office adult non-employee reports 3 years after settlement or denial of claim.* d) Destroy in office reports that do not result in claims or official action after 3 years. e) Destroy in office reports of minors after minor has reached age of 21.	
8.02	DECLARATIONS AND TERMINATIONS OF STATES OF EMERGENCY	Retain in office permanently.	Authority: G.S. 166A-19.22


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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.03 	DISASTER AND EMERGENCY MANAGEMENT PLANS @ Records concerning preparedness, evacuations, and operations in the event of a disaster (natural, accidental, or malicious). Includes background surveys, studies, reports, and records concerning the process of notifying personnel in the event of an emergency. Also includes Continuity of Operations Plans (COOP) and Business Continuity Plans (BCP).	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
8.04	DISASTER RECOVERY Administrative records documenting and recovery efforts for emergencies of a short duration as well as disasters inflicting widespread destruction and having long-term consequences for the agency. Includes documents coordinating activities with federal, state, and local emergency management, incident reports, inventories, and disaster relief allocations.	a) Retain in office permanently records documenting major agency disaster recovery efforts and records evaluating emergency response and efficacy. b) Destroy in office after 3 years records concerning minor or routine agency recovery operations that are managed with minimal disruption to normal operations.	
8.05	EMERGENCY DRILLS AND EQUIPMENT RECORDS Includes test records for fire suppression, defibrillator, respirator fit, and other emergency equipment. Also includes records concerning agency emergency and fire drills.	Destroy in office when superseded or obsolete.	
8.06	EMERGENCY NOTIFICATIONS Notifications and alerts sent to residents by Emergency Management or other agency staff regarding a current emergency.	Destroy in office after 1 year.	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.07	<p>EMPLOYEE SECURITY RECORDS</p> <p>Records concerning the issuance of keys, identification cards, parking assignments, passes, etc., to employees.</p> <p>SEE ALSO: Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy in office when superseded or obsolete.	
8.08	<p>FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS</p> <p>Records concerning agency safety measures. Includes reports, logs, and other related records documenting inspections of agency facilities.</p>	<p>a) Destroy in office inspection reports after 7 years.</p> <p>b) Destroy in office safety audits after 3 years.</p> <p>c) Destroy in office remaining records when superseded or obsolete.</p>	
8.09	<p>FIXED NUCLEAR FACILITIES PLANS FILE</p> <p>Records concerning emergency plans for county fixed nuclear facilities.</p>	Destroy in office when superseded or obsolete.	
8.10	<p>FUEL OIL STORAGE TANK RECORDS</p>	Destroy in office closure records 3 years after completion of permanent closure.	<p>Authority: 40 CFR 280.34</p> <p>Retention: 40 CFR 280.74</p>

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.11	<p>HAZARDOUS MATERIALS MANAGEMENT</p> <p>Records documenting agency efforts to prevent and mitigate exposure to hazardous materials. Includes risk assessments, management plans, and abatement/removal records.</p> <p>SEE ALSO: Safety Data Sheets (below).</p> <p><i>Note: Title 10A of the NC Administrative Code provides guidelines about the records requirements for persons who receive, possess, use, transfer, own or acquire any sources of radiation within the State of North Carolina.</i></p>	<p>a) Retain in office permanently records documenting hazardous waste disposal sites on agency property and documenting the use of pathogens and biological toxins (select agents) at the agency.</p> <p>b) Destroy in office asbestos records 1 year after building is demolished. <i>(Note: If building is sold, transfer records to new owner.)</i></p> <p>c) Destroy in office after 5 years records concerning the receipt, maintenance, and disposal of radioactive materials.</p> <p>d) Destroy in office 3 years after superseded or obsolete records concerning hazard mitigation plans.</p> <p>e) Destroy in office records documenting environmental and hazardous waste remediation projects 5 years after project completion.</p> <p>f) Destroy in office remaining records after 30 years.</p>	<p>Retention: 29 CFR 1910.1001(j)(3)(ii)</p>

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.12	INSURANCE POLICIES Records concerning automobile, theft, fire, and all other insurance policies purchased by agency. Also includes insurance audits, claims reports, surveys, endorsements, certificates of insurance, and waivers.	a) Destroy in office records concerning automobile and other liability insurance policies 10 years after superseded or obsolete.* b) Destroy in office certificates of insurance after 1 year. c) Destroy in office self-insurer certifications 6 years from date of termination of policy or settlement of all claims. d) Destroy in office remaining records after 1 year after superseded or obsolete.	
8.13	LOSS CONTROL INSPECTION REPORTS Self-inspections to identify potential liabilities or hazards that may exist in agency owned buildings or property.	Destroy in office when superseded or obsolete.	
8.14	LOST, STOLEN, OR DAMAGED PROPERTY REPORTS Includes reports of property lost or stolen at agency. Also includes reports and employee narratives of vandalism to agency property.	Destroy in office after 2 years.*	
8.15	NATIONAL FLOOD INSURANCE PROGRAM RECORDS Records concerning the participation of a local government agency in FEMA's National Flood Insurance Program (NFIP). Includes floodplain management ordinances, maps, and other related records.	a) Retain in office permanently floodplain management ordinances. b) Destroy in office copies of flood insurance rate maps, elevation certificates, and elevation information when superseded or obsolete.	

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.16	<p>OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION (OSHA)</p> <p>Records concerning injury or illness, extent and outcomes, summary totals for calendar year, and OSHA forms. Includes ergonomic assessments for employees.</p>	<p>Destroy in office after 5 years.</p>	<p>Retention: 29 CFR 1904.33 29 CFR 1904.44</p>
8.17	<p>SAFETY DATA SHEETS</p> <p>Forms supplied to agencies from manufacturers and distributors of hazardous materials for materials held by the agency.</p>	<p>Destroy in office 30 years after materials have been disposed of according to manufacturer's instructions.</p> <p><i>Retention Note: A data sheet for a mixture may be discarded if the new data sheet includes the same hazardous chemicals as the original formulation. If the formulation is different, both data sheets must be retained for 30 years. Data sheets may also be discarded if some other record identifying the substances used, where they were used, and when they were used is retained the required 30-year period.</i></p>	<p>Retention: 29 CFR 1910.1020(d)(1)(ii)(B)</p>

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2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 9: WORKFORCE DEVELOPMENT RECORDS**

Official records created and accumulated by the agency to manage workforce development programs. Relevant legislation includes the Comprehensive Employment and Training Act, the Job Training and Partnership Act, the Workforce Investment Act, and the Workforce Innovation and Opportunity Act.

ITEM #	STANDARD 9: WORKFORCE DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
9.01	AUDIT/AUDIT RESOLUTIONS Records concerning reports from financial and compliance audits conducted on Workforce Investment Act programs in accordance with OMB Circular A-133. Includes audit reports and correspondence concerning audits and audit resolutions for the local area. Also includes federal and state audits.	Destroy in office after 3 years.	Authority: OMB Circular A-133 29 CFR 97.26
9.02	LOCAL AREA JOB TRAINING PLAN RECORDS Records concerning the local board's bid process for contracting workforce development programs.	Destroy in office when superseded or obsolete.	Authority: 20 CFR 652.8
9.03	PARTICIPANT RECORDS Records concerning applicants, registrants, eligible applicants/registrants, participants, terminees, and employees who submit requests for services of the Dislocated Workers Program and Workforce Investment Act programs. Includes applications, client history, Employability Development Plans, program referral, monitoring notes, pay authorizations, release forms, and Workforce Investment Act follow-up questionnaires.	Destroy in office 3 years after close of audit/final year expenditure.*	Authority: 20 CFR 652.8

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MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.
-

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.
-

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.
-

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.
-

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-19) can be used for such requests.
-

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
- “Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or characteristics, made or received pursuant to law or ordinance in connection with the

transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (State or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the State or of any county, unit, special district or other political subdivision of government.

Q. Is any person allowed to see my records?

- A. Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at ± times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. What about my confidential records?

- A. Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.
-

Q. Am I required to make available to the public copies of drafts that have not been approved?

- A. Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.
-

Q. What do I do with permanent records?

- A. Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**” (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.
- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records

available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.

- Adoptions, marriages, and divorces document changes in familial relationships. Though adoptions are confidential (not available for public inspection), they document changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its constituents. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of residents and organizations?
- Do they have a long-term impact on residents and organizations?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.
-

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on page A-22. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. *May I store our unused records in the basement, attic, shed, etc.?*

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. *Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?*

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. *Aren't all our old records at the State Archives of North Carolina?*

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. *I found some really old records. What should I do with them?*

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. *Can I give my old records to the historical society or public library?*

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. *Whom can I call with questions?*

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See Audits: Performance (STANDARD 1: ADMINISTRATIVE AND MANAGEMENT RECORDS) and Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the *General Records Schedule: Local Government Agencies*, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the *General Records Schedule: Local Government Agencies* or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-signatures>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.
-

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. Am I required to tell anyone about the destructions?

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).



Destructions Log

County/Municipality			
Division	Section	Branch	
Location(s) of Records			

Records Series	Required Retention	Date Range	Volume (file drawers or MB)	Media (Paper, Electronic)		Date of Destruction	Method of Destruction	Authorization for Destruction
				P	E			

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

A. E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

A. We do not recommend printing e-mail for preservation purposes. Important metadata is lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

A. The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. *We have an imaging system. Are we required to keep the paper?*

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. *Computer storage is cheap. Can I just keep my computer records permanently?*

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. *What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?*

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years (see Leave Records, STANDARD 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:

- Parcel data
- Street centerline data
- Corporate limits data
- Extraterritorial jurisdiction data
- Zoning data, address points
- Orthophotography (imagery)
- Utilities
- Emergency/E-911 themes

For more information, see **STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS.**

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

Q. *Who should be responsible for creation and long-term storage of archived data?*

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. *Can I obtain digital copies of the security preservation records?*

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

A. We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:

- Managing public records in North Carolina
- Disaster preparedness and recovery
- Confidentiality
- Organizing paper and digital files
- Digital communications

Q. Will you design a workshop especially for our office?

A. Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

A. No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public. To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

A. Not at this time.

Q. Are the workshops available in an online format?

A. We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

Add a new item

Delete an existing item

Change a retention period

Standard Number _____ Page _____ Item Number _____

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

In accordance with the provisions of N.C. Gen. Stat. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature Title Date

Approved by:

Signature Requestor's Supervisor Date

Concurred by:

Signature Assistant Records Administrator State Archives of North Carolina Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:		Date (MM-DD-YYYY):
Phone (area code):	Email:	
County/Municipality:	Office:	
Mailing address:		

Records Series Title A group of records as listed in records retention schedule	Description of Records Specific records as referred to in-office	Inclusive Dates (1987-1989; 2005-present)	Approx. Volume of Records (e.g. "1 file cabinet," "5 boxes")	Retention Period As listed in records retention schedule

Requested by: _____
Signature Title Date

Approved by: _____
Signature Requestor's Supervisor Date

Concurred by: _____
Signature Assistant Records Administrator State Archives of North Carolina Date



File Plan

County/Municipality				
Division		Section		Branch

Records Series	Records Creator	Records Owner (if record copy is transferred within the agency)	Media (Paper, Electronic, Scanned)			Required Retention	Location(s) of Records
			P	E	S		



Related Records Series Found in Local Agency Program Schedules

In some limited cases, records series with similar names and/or functions that are created and maintained by local government entities have not been superseded by the *General Records Schedule: Local Government Agencies*. These records series are described as unique records series in one of the local program retention schedules issued separately by DNCR for use by specific local agencies. This duplication occurs when records with similar names and/or functions have different retention guidance due to statutory, legal, evidentiary, or fiscal requirements. An example of this is the accounts receivable records series. In the *General Records Schedule*, the Accounts Receivable records series has a disposition instruction of “Destroy in office 3 years after collection.” In the *Local Health Departments Schedule*, the Accounts Receivable: Clinical Services records series also includes the disposition instruction, “Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.” In both cases, the records series documents the money received by the local agency, however, the retention requirements for the Accounts Receivable: Clinical Services differ due to specific retention requirements concerning the management and dispersal of grant funds.

The purpose of this table is to provide a source for determining if the general records series item listed in the *General Records Schedule: Local Government Agencies* covers the function and/or retention requirements associated with the records created by your agency or if a specific program schedule applies. This table provides pointers to the relevant records series that can be found in one or more of the local agency program schedules.

Here’s how to use the table:

- The records series found in the left-most column are listed and described in the *General Records Schedule: Local Government Agencies* and appear in this schedule with a @ beside them.

ACCOUNTS RECEIVABLE @
 Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.

- The middle column lists similar records series from one or more of the schedules that have been issued separately for use by specific local agencies.
- The right-hand column lists the local agency program schedule that includes the records series listed in the middle column. The agencies represented in the right column include, but are not limited to, local health departments, Registers of Deeds, Sheriff’s offices, local social services agencies, and tax offices.

If you need further information, please contact a Records Management Analyst.

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable	Accounts Receivable: Clinical Services	Local Health Departments Schedule

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable (cont.)	Accounts Receivable – Client Services	LME Schedule LME-MCO Schedule
Administrative Directives, Regulations, and Rules	State Board of Elections Numbered Memos	County Board of Elections Schedule
Audits: Financial	Clinical Record Audits	Local Health Departments Schedule
	Clinical Record Audits	LME Schedule
	Clinical Record Audits	LME-MCO Schedule
Audits: Performance	Pharmacy Audit Records	Local Health Departments Schedule
Blueprints and Specifications	Blueprints and Specifications	Local Government Agencies Program Schedule
	Project Records – Core	
Community Awards	Student Awards and Honors Records	Local Public School Unit Schedule
Conferences and Workshops	Health Promotion Training Records	Local Health Departments Schedule
Constituent Comments, Complaints, Petitions, and Service Requests	Animal Complaint Records	Local Government Agencies Program Schedule
	Illegal Dumping File	
	Violations: Building and Housing	
	Violations: Solid Waste Management	
	Complaints (Law Enforcement)	County Sheriff's Office
	Complaints	
	Complaints: All Service Areas	
	Animal Complaints	
Complaints File	LME Schedule	
Complaints File	LME-MCO Schedule	
Contracts, Leases, and Agreements	School Health Provider Contracts	Local Health Departments Schedule
	Petroleum Leases Register	Register of Deeds Schedule
Disaster and Emergency Management Plans	Public Health Emergency Preparedness and Response Records	Local Health Departments Schedule
Equipment and Vehicle Maintenance, Repair, and Inspection Records	Equipment and Instrument Maintenance and Repair File	Local Health Departments Schedule
	Autopsy and Surgical Pathology: Instrument Maintenance Records	Public Hospitals Schedule
	Clinical Laboratory Records: Instrument Maintenance Records	
	Cytology Records: Instrument Maintenance Records File	
	Instrument Maintenance File	

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule	
Grants Grants: Financial	CDBG Records CDBG Outstanding Loan Balances CDBG Subject to Reversion of Assets Provisions or Change of Use of Real Property Continuum of Care Records Emergency Solutions Grants Records Home Investment Partnerships Program Records Housing Assistance for Persons with Disabilities Housing Opportunities for Persons with AIDS Records	Local Government Agencies Program Schedule	
Indices	Board of Adjustment Case Files and Indexes Conditional Use Permit Records and Index Rezoning Records and Indexes	Local Government Agencies Program Schedule	
	Master Client Identification File (Master Client Index)	LME Schedule LME-MCO Schedule	
	Master Patient Index	Public Hospital Schedule	
	Armed Forces Discharges and Index Chattel Mortgages and Index Corporations (Incorporations) Records and Index Deeds, Record of and Index Deeds of Trust (Mortgages), Record of and Index Highway Right-of-Way Maps and Index Land Sold for Taxes and Index Merchant Returns and Index Mineral Rights Records and Index Notaries Public Records and Index Official Record Book and Index Partnerships and Assumed Names Records and Index Plats, Maps, and Index Registration of Titles (Torrens Act) and Index Surveys, Record of and Index Timber Marks and Index Vital Records: Births and Index Vital Records: Deaths and Index Vital Records: Delayed Births and Index	Register of Deeds Schedule	
	Inventories	Drug Inventories	Local Health Departments Schedule

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Inventories (cont.)	Drugs Inventories	Public Hospitals Schedule
Maps: All Other	Utilities: Maps (Utility Installations & Distributions)	Local Government Agencies Program Schedule
	Plats, Maps, and Index	Register of Deeds Schedule
	Maps (Utility Installations and Distributions)	Water and Sewer Authorities and Sanitary Districts Schedule
Policies and Procedures	Clinical Policies and Procedures Laboratory Procedures Manual Behavioral Health Program Policy and Procedure Records	Local Health Departments Schedule
	Laboratory Procedures/Protocol File	Public Hospitals Schedule
Poll List/Registration List/Roster/Authorization to Vote (ATV)	Poll List/Registration List/Roster/Authorization to Vote (ATV)	County Board of Elections Schedule
Projects	Appraisal Project File Project Records – Cancelled Project Records – Core Project Records – Engineering & Compliance	Local Government Agencies Program Schedule
	State Board of Elections Correspondence and Reports	County Board of Elections Schedule
	Water and Wastewater System Project Records	Waste and Sewer Authorities and Sanitary Districts Schedule
Publicity Records	Student Publicity Records	Local Public School Unit Schedule
Rate and Fee Schedules	Fee Schedules	Local Health Departments Schedule
	Fee Schedules	LME Schedule
	Fee Schedules	LME-MCO Schedule
Recordings: Customer Call Center Recordings Audio-Visual Recordings	Traffic Video Recordings and Data Law Enforcement Audio and Video Recordings Communication Records Electronic Recordings of Interrogations	Local Government Agencies Program Schedule
	Audio and Video Recordings Communication Records Electronic Recordings of Interrogations (Juvenile and Homicide)	County Sheriff's Office

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
(continued on following page)	Daily Store Reports Monthly Law Enforcement Activity Reports Monthly Operating Report to Board Receiving Report Sales Reports Stock Difference Reports Weekly Warehouse Reports	Alcoholic Beverage Control Boards Schedule
	Campaign Contribution and Expenditure Reports Ballot Reports State Board of Elections Correspondence and Reports Voter Registration Lists and Reports	County Board of Elections Schedule
	Alarm Call Reports Arrest Reports Detention Facility Incident Reports DWI Reports Incident Response Reports Inmate Death Reports Traffic Accident Reports	County Sheriff's Office
	Program Time and Activity Reports Medicare Disbursement Reports Communicable Disease Reports Test Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Local Health Departments Schedule
	Medicare Disbursement Reports	LME Schedule LME-MCO Schedule
	Admission/Discharge/Transfer Reports Communicable Disease Reports Call-In Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Public Hospitals Schedule

2021 GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Certified Facility Operators Logs and Reports Discharge Monitoring Reports Periodic Inspection Reports of Industrial Facilities Wastewater Maintenance Operation Reports	Waste and Sewer Authorities and Sanitary Districts Schedule
Strategic Plan	Land Development and Planning Studies and Reports Parks Planning File Comprehensive Plan and Amendments Environmental: Comprehensive Solid Waste Management Plan and Amendments Planning File (Street Maintenance)	Local Government Agencies Program Schedule

1

1099 FORMS. *SEE* TAX FORMS

A

ABOLISHED POSITIONS, 43
ABSTRACTS OF MUNICIPAL ELECTIONS, 1
ACCIDENT/INCIDENT REPORTS (CUSTOMER AND EMPLOYEE), 80
ACCOUNTS PAYABLE, 23
ACCOUNTS RECEIVABLE, 23
ACCOUNTS UNCOLLECTABLE, 24
ACCREDITATION RECORDS, 1
ADDRESS POINTS, 38
ADMINISTRATION AND MANAGEMENT RECORDS, 1
ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES, 1
ADMINISTRATIVE INVESTIGATIONS, 43
AFFIDAVITS OF PUBLICATION, 67
AGENCY PUBLICATIONS, 75
AMBULANCE SERVICE BILLS AND RECORDS FOR EMERGENCY MEDICAL SERVICE. *SEE* ACCOUNTS PAYABLE
ANNEXATION FILE, 67
ANNUAL BUDGET, 24
APPLICATIONS FOR EMPLOYMENT, 44
APPRENTICESHIP PROGRAM RECORDS, 44
APTITUDE AND SKILLS TESTING RECORDS, 45
ARBITRAGE RECORDS, 24
ASBESTOS MANAGEMENT PLAN. *SEE* HAZARDOUS MATERIALS MANAGEMENT
ASBESTOS TRAINING, 45
AUDIO-VISUAL RECORDINGS, 75
AUDITS
 FINANCIAL, 24
 IT SYSTEMS, 61
 PERFORMANCE, 2
AUTHENTICATIONS, 67
AUTHORIZATION FORMS, 24

B

BANK STATEMENTS, 25
BANK STATEMENTS AND RECONCILIATIONS, 25
BENEFITS RECORDS, 46
BENEFITS REIMBURSEMENT PLAN. *SEE* BENEFITS RECORDS
BIDS FOR DISPOSAL OF PROPERTY, 25
BIDS FOR PURCHASE, 25
BIOGRAPHICAL DATA. *SEE* HISTORY RECORDS

INDEX

BLOODBORNE PATHOGEN TRAINING, 46
BLUEPRINTS AND SPECIFICATIONS, 2
BOND CLOSING RECORDS, 25
BOND REGISTER, 26
BONDS, 3
BONDS, NOTES, AND COUPONS, 26
BUDGET ADMINISTRATION RECORDS, 26
BUDGET EXECUTION RECORDS, 26
BUDGET REPORTS, 26
BUDGET REQUESTS AND WORKING PAPERS, 26
BUDGET RESOLUTIONS AND ORDINANCES, 27
BUDGET, FISCAL, AND PAYROLL RECORDS, 23
BULLETINS, 3
BUSINESS CERTIFICATION RECORDS, 3
BUSINESS DEVELOPMENT SUBJECT FILE, 3

C

CALENDARS OF EVENTS AND APPOINTMENTS, 3
CALL CENTER RECORDINGS. *SEE* CUSTOMER CALL CENTER RECORDINGS
CANCELED CHECKS. *SEE* BANK STATEMENTS AND RECONCILIATIONS
CASH REPORTS. *SEE* ACCOUNTS RECEIVABLE
CENSUS PROJECT RECORDS, 3
CHARTER RECORDS, 4
CHECK REGISTERS. *SEE* BANK STATEMENTS AND RECONCILIATIONS
CHECK STUBS. *SEE* BANK STATEMENTS AND RECONCILIATIONS
CITIZEN COMPLAINTS. *SEE* CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS
CIVIL RIGHTS CASE RECORDS, 68
CIVIL RIGHTS RECORDS, 69
COLLECTED DATA, 4
COMMUNITY AWARDS, 75
COMPLAINTS (CONSTITUENTS). *SEE* CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS
COMPUTER AND NETWORK USAGE RECORDS, 61
CONDEMNATION RECORDS, 69
CONFERENCES AND WORKSHOPS, 76
CONFLICTS OF COMMITMENT, 70
CONFLICTS OF INTEREST, 70
CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS, 5
CONSTITUENT SURVEYS, 5
CONTRACT BUDGET REPORTS, 26
CONTRACT WORKER RECORDS, 57
CONTRACTS, LEASES, AND AGREEMENTS, 70

CORE DATA (GIS RECORDS). *SEE* GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA
CORPORATE LIMITS, 38
CORRESPONDENCE (LEGAL), 72
CORRESPONDENCE AND MEMORANDA, 6
COST ALLOCATION PLANS, 27
CREDIT/DEBIT/PROCUREMENT CARD RECORDS, 27
CUSTOMER CALL CENTER RECORDINGS, 6

D

DAILY DETAIL REPORTS. *SEE* BUDGET REPORTS
DATA DOCUMENTATION (METADATA) (GIS RECORDS). *SEE* GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA)
DATA DOCUMENTATION RECORDS, 61
DATA MIGRATION RECORDS, 62
DATA WAREHOUSES, 62
DEBIT CARD PAYMENTS. *SEE* PAYMENT CARD DATA
DEBT FINANCING. *SEE* LOAN RECORDS
DECLARATORY RULINGS, 70
DELEGATION OF AUTHORITY RECORDS, 71
DEPOSITS. *SEE* ACCOUNTS RECEIVABLE
DESTRUCTIONS LOG, 10
DETAIL REPORT. *SEE* FINANCIAL REPORTS
DIGITIZATION AND SCANNING RECORDS, 62
DIRECT DEPOSIT FORMS. *SEE* ELECTRONIC FUNDS TRANSFERS
DIRECTORIES, ROSTERS, OR INDICES, EMPLOYEE, 46
DISABILITY SALARY CONTINUATION CLAIMS, 47
DISASTER AND EMERGENCY MANAGEMENT PLANS, 81
DISASTER RECOVERY, 81
DISCIPLINARY ACTIONS, 47
DONATIONS AND SOLICITATIONS, 27
DRUG AND ALCOHOL PROGRAMS FILE. *SEE* EMPLOYEE ASSISTANCE PROGRAMS
DUAL EMPLOYMENT, 48

E

EASEMENTS AND RIGHT-OF-WAY AGREEMENTS, 71
EDUCATIONAL ASSISTANCE, EMPLOYEE, 48
EDUCATIONAL LEAVE AND REIMBURSEMENT, 48
EDUCATIONAL MATERIALS, 76
EDUCATIONAL RECORDS, EMPLOYEE, 58
ELECTRONIC FUNDS TRANSFERS, 27
ELECTRONIC RECORDS POLICIES AND PROCEDURES, 62
EMERGENCY DRILLS AND EQUIPMENT RECORDS, 81
EMERGENCY NOTIFICATIONS, 81
EMPLOYEE ASSISTANCE PROGRAMS, 48

EMPLOYMENT ELIGIBILITY RECORDS, 49
EMPLOYMENT SELECTION RECORDS, 49
ENCROACHMENTS, 71
EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS, 6
EQUIPMENT INVENTORIES, 10
EQUIPMENT REFERENCE RECORDS, 7
EQUIPMENT USAGE RECORDS, 7
ESCHEATS AND UNCLAIMED PROPERTY, 28
EXIT INTERVIEW RECORDS, EMPLOYEE, 50
EXPENDITURE REPORTS. *SEE* BUDGET REPORTS
EXPUNCTIONS, 71
EXTRATERRITORIAL JURISDICTIONS, 39

F

FACILITY MAINTENANCE, REPAIR AND INSPECTION RECORDS, 7
FACILITY SERVICE AND MAINTENANCE AGREEMENTS. *SEE* CONTRACTS, LEASES, AND AGREEMENTS
FACILITY USAGE RECORDS, 7
FAMILY MEDICAL LEAVE ACT (FMLA) RECORDS, 50
FEE SCHEDULES, 17
FILE PLAN, 22
FINANCIAL JOURNALS AND LEDGERS, 28
FINANCIAL REPORTS, 28
FIRE EXTINGUISHER RECORDS. *SEE* EMERGENCY DRILLS AND EQUIPMENT RECORDS
FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS, 82
FIXED ASSETS. *SEE* INVENTORIES
FIXED NUCLEAR FACILITIES PLANS FILE, 82
FORMS AND TEMPLATES, 7
FUEL OIL STORAGE TANK RECORDS, 82
FUND DRIVE AND EVENT RECORDS, 76

G

GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA, 36
GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA), 36
GEOGRAPHIC INFORMATION SYSTEM (GIS) INTERNAL STANDARDS AND PROCEDURES, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) MONITORING RECORDS, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) OPERATIONAL RECORDS, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) PROJECT RECORDS, 37
GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS, 36

GOVERNING AND ADVISORY BODY MEMBER FILES.
SEE PUBLIC BODIES: \MEMBER FILES
GOVERNMENT EMPLOYEES RETIREMENT SYSTEM
MONTHLY REPORTS, 28
GRANT PROPOSALS, 8
GRANTS, 8
FINANCIAL, 29
GRIEVANCES, 51

H

HAZARDOUS MATERIALS MANAGEMENT, 83
HAZARDOUS MATERIALS TRAINING RECORDS, 51
HEALTH CERTIFICATES, EMPLOYEE. SEE MEDICAL
RECORDS
HISTORICAL DESIGNATIONS RECORDS, 9
HISTORY RECORDS (AGENCY AND EMPLOYEES, 9

I

I-9 FORMS. SEE EMPLOYMENT ELIGIBILITY RECORDS
IMAGING RECORDS, 62
IMPROPER CONDUCT INVESTIGATIONS, 9
INDICES, 9
INFORMATION TECHNOLOGY (IT) RECORDS, 61
INFORMATION TECHNOLOGY ASSISTANCE RECORDS,
63
INSPECTION RECORDS. SEE EQUIPMENT AND
VEHICLE MAINTENANCE, REPAIR, AND
INSPECTION RECORDS
INSPECTION RECORDS, FACILITY, 7
INSURANCE POLICIES, 84
INTERAGENCY PROGRAMS, 9
INTERNAL STANDARDS AND PROCEDURES (GIS
RECORDS) \T, 37
INTERNSHIP PROGRAM, 51
INVENTORIES, 10
INVESTIGATION AND HEARING RECORDS, 72
INVESTMENTS, 29
INVITATIONS, 77
INVOICES. SEE ACCOUNTS PAYABLE
IT DISASTER PREPAREDNESS AND RECOVERY PLANS.
SEE DISASTER AND EMERGENCY MANAGEMENT
PLANS

L

LAND OWNERSHIP RECORDS, 72
LAW ENFORCEMENT TRAINING, 51
LEAVE RECORDS, 52
LEGAL OPINIONS, 72
LEGAL RECORDS, 67
LEGAL REVIEW RECORDS, 72

LEGISLATION AND REGULATORY RECORDS, 10
LTERS MONTHLY REPORTS. SEE GOVERNMENT
EMPLOYEES RETIREMENT SYSTEM MONTHLY
REPORTS
LITIGATION CASE RECORDS, 73
LOAN RECORDS, 30
LOCAL GOVERNMENT COMMISSION FINANCIAL
STATEMENTS, 30
LOGISTICS MATERIALS, 10
LONGEVITY PAY, 30
LOSS CONTROL INSPECTION REPORTS, 84
LOST, STOLEN, OR DAMAGED PROPERTY REPORTS,
84

M

MAIL, UNDELIVERABLE/RETURNED, 10
MAILING AND DISTRIBUTION RECORDS, 10
MAINTENANCE RECORDS. SEE EQUIPMENT AND
VEHICLE MAINTENANCE, REPAIR, AND
INSPECTION RECORDS
MAINTENANCE RECORDS, FACILITY, 7
MANAGEMENT STUDIES. SEE REPORTS AND STUDIES
MAPPING PROJECT RECORDS, 40
MAPS
ALL OTHER, 42
PARCEL, 41
PARKS, 41
MAPS (PAPER). SEE MAPS: ALL OTHER
MEDIA FILE, 77
MEDICAL RECORDS, EMPLOYEE, 52
MEMBERSHIP RECORDS, 11
METADATA (GIS RECORDS). SEE GEOGRAPHIC
INFORMATION SYSTEM (GIS) DATA
DOCUMENTATION (METADATA)
MILITARY LEAVE, 53
MINUTES OF PUBLIC BODIES. SEE PUBLIC BODIES:
MINUTES
MISCELLANEOUS (NON-BUILDING) APPLICATIONS,
LICENSES, AND PERMITS, 11
MONITORING RECORDS (GIS RECORDS). SEE
GEOGRAPHIC INFORMATION SYSTEM (GIS)
MONITORING RECORDS

N

NATIONAL FLOOD INSURANCE PROGRAM RECORDS,
84
NETWORK AND SYSTEM SECURITY RECORDS, 63
NETWORK DIAGRAMS, 63
NEWSPAPER CLIPPINGS. SEE HISTORY RECORDS
NOTICES OF PUBLIC MEETINGS. SEE PUBLIC BODIES:
MEETING NOTICES

O

OATHS OF OFFICE, 73
OCCUPATIONAL SAFETY AND HEALTH
ADMINISTRATION (OSHA), 85
OFFICE AND PROPERTY SECURITY RECORDS, 11
OPERATIONAL RECORDS (GIS RECORDS). *SEE*
GEOGRAPHIC INFORMATION SYSTEM (GIS)
OPERATIONAL RECORDS
ORDINANCE DEVELOPMENT RECORDS, 12
ORDINANCES, 12
ORTHOIMAGERY, 39
OSHA, 85

P

PARKING. *SEE* SECURITY RECORDS, EMPLOYEE
PAYMENT CARD DATA, 30
PAYROLL AND EARNINGS RECORDS, 31
PAYROLL DEDUCTION RECORDS, 32
PENSION PLAN ENROLLMENT FORMS, EMPLOYEE.
SEE RETIREMENT RECORDS
PERFORMANCE REVIEWS, EMPLOYEE, 53
PERMISSIONS, 73
PERSONNEL ACTION NOTICES, 53
PERSONNEL RECORDS, 43
PERSONNEL RECORDS (OFFICIAL COPY), 54
PERSONNEL RECORDS (SUPERVISOR COPY), 54
PEST CONTROL, 12
PETITIONS (CONSTITUENT). *SEE* CONSTITUENT
COMMENTS, COMPLAINTS, PETITIONS, AND
SERVICE REQUESTS
PETTY CASH. *SEE* ACCOUNTS RECEIVABLE
PHONE LOGS, 12
POLICIES AND PROCEDURES, 13
POLICIES AND PROCEDURES (PERSONNEL), 55
POLL LIST, 13
POLYGRAPH RECORDS, EMPLOYEE, 55
POPULAR ANNUAL FINANCE REPORT, 77
POSITION CLASSIFICATION, 56
POSITION CONTROL, 56
POSITION DESCRIPTIONS, 56
POSITION EVALUATIONS, 56
POSITION HISTORY, 56
POSITION REQUISITION AND ANALYSIS RECORDS.
SEE POSITION CLASIFICATION, CONTROL, AND
HISTORY
POWELL BILL RECORDS, 32
PRE-TRIAL RELEASE PROGRAM RECORDS, 74
PRICE QUOTATIONS, 13
PROCEDURES (GIS RECORDS). *SEE* GEOGRAPHIC
INFORMATION SYSTEM (GIS) INTERNAL
STANDARDS AND PROCEDURES

PROCLAMATIONS AND ORDERS, 14
PROJECT DOCUMENTATION (INFORMATION
TECHNOLOGY), 64
PROJECT RECORDS (GIS RECORDS). *SEE* GEOGRAPHIC
INFORMATION SYSTEM (GIS) PROJECT RECORDS
PROJECTS, 14
PROPERTY INVENTORIES, 10
PROPERTY MANAGEMENT RECORDS, 14
PUBLIC BODIES
 \AGENDA AND MEETING PACKETS, 15
 \APPLICATIONS FOR APPOINTMENT, 15
 \APPOINTMENT REPORTS, 15
 \AUDIO AND VIDEO RECORDINGS OF MEETINGS,
 15
 \CORRESPONDENCE, 16
 \MEETING NOTICES, 16
 \MEMBER FILES, 16
 \MINUTES, 17
PUBLIC HEARINGS, 77
PUBLIC RECORDS REQUESTS, 78
PUBLIC RELATIONS RECORDS, 75
PUBLICATIONS RECEIVED. *SEE* REFERENCE (READING)
FILE
PUBLICITY RECORDS, 78
PURCHASE ORDERS, 32

Q

QUALIFIED PRODUCTS LISTS, 32

R

RATE SCHEDULES, 17
REBATE PROGRAM RECORDS, 18
RECONCILIATIONS (FINANCIAL), 25
RECORDS BACKUPS, SYSTEM MAINTENANCE
RECORDS, 65
RECORDS MANAGEMENT, 18
RECRUITMENT RECORDS, 56
REFERENCE (READING) FILE, 18
REFUND REPORTS. *SEE* FINANCIAL REPORTS
REGULATORY RECORDS (EXTERNAL). *SEE*
LEGISLATION AND REGULATORY RECORDS
RELEASE FORMS, 74
REPAIR RECORDS. *SEE* EQUIPMENT AND VEHICLE
MAINTENANCE, REPAIR, AND INSPECTION
RECORDS
REPAIR RECORDS, FACILITY, 7
REPORTS AND STUDIES, 19
REQUEST FOR CHANGE IN LOCAL GOVERNMENT
RECORDS SCHEDULE, 19
REQUEST FOR DISPOSAL OF ORIGINAL RECORDS
DUPLICATED BY ELECTRONIC MEANS, 21

REQUEST FOR DISPOSAL OF UNSCHEDULED RECORDS, 20
REQUESTS FOR INFORMATION, 20
REQUESTS FOR PROPOSALS, 20
REQUISITIONS, 33
RESOLUTION DEVELOPMENT RECORDS, 20
RESOLUTIONS, 20
RESPIRATOR PROGRAM RECORDS. *SEE* EMERGENCY DRILLS AND EQUIPMENT RECORDS
RETIREMENT RECORDS, EMPLOYEE, 57
RETURNED CHECKS. *SEE* ACCOUNTS UNCOLLECTABLE
RISK MANAGEMENT RECORDS, 80

S

SAFETY DATA SHEETS, 85
SALES AND USE TAX REPORTS. *SEE* TAX RETURNS
SALES INFORMATION. *SEE* ACCOUNTS RECEIVABLE
SCANNING RECORDS. *SEE* DIGITIZATION AND SCANNING RECORDS
SCHOLARSHIP RECORDS, 33
SEASONAL WORKER RECORDS, 57
SECONDARY EMPLOYMENT, 57
SECURITY RECORDS, EMPLOYEE, 82
SECURITY VIDEO RECORDINGS. *SEE* OFFICE AND PROPERTY SECURITY RECORDS
SELF-INSURER CERTIFICATIONS. *SEE* INSURANCE POLICIES
SERVICE AWARDS AND COMMENDATIONS, 58
SERVICE REQUESTS (CONSTITUENT). *SEE* CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS
SETTLEMENTS, 74
SHIFT PREMIUM PAY, 33
SOCIAL MEDIA, 78, 12
SOFTWARE LICENSE AND COPYRIGHT PROVISIONS RECORDS, 64
SPACE NEED STUDIES. *SEE* REPORTS AND STUDIES
SPECIAL EVENT RECORDS. *SEE* FUND DRIVE AND EVENT RECORDS
SPEECHES, 78
STAFF MEETINGS FILE, 21
STANDARDS (GIS RECORDS), 37
STATE AND OTHER COUNTY PROGRAMS. *SEE* REFERENCE (READING) FILE
STATE OF EMERGENCY, 80
STATEMENTS OF BACK PAY, 33
STOLEN PROPERTY REPORTS, 84
STRATEGIC PLAN, 21
STREET CENTERLINE, 40
SUGGESTIONS, EMPLOYEE, 58
SURPLUS PROPERTY, 21
SURVEYS, EMPLOYEE, 58

SYSTEM ACCESS RECORDS (INFORMATION TECHNOLOGY), 64
SYSTEM DOCUMENTATION RECORDS, 64
SYSTEM MAINTENANCE RECORDS
 \HARDWARE REPAIR OR SERVICE, 65
 \RECORDS BACKUPS, 65

T

TAX FORMS, 34
TAX RETURNS, 34
TECHNICAL PROGRAM DOCUMENTATION, 65
TEMPORARY EMPLOYEE RECORDS. *SEE* PERSONNEL RECORDS (OFFICIAL COPY)
TEXT MESSAGES, 12
TIME SHEETS, CARDS, AND ATTENDANCE RECORDS, 34
TRACKING MATERIALS, 21
TRAINING RECORDS, EMPLOYEE, 58
TRAVEL REIMBURSEMENTS, 35
TRAVEL REQUESTS, 22
TSERS MONTHLY REPORTS. *SEE* GOVERNMENT EMPLOYEES RETIREMENT SYSTEM MONTHLY REPORTS

U

UNEMPLOYMENT COMPENSATION CLAIMS, 59
UNEMPLOYMENT COMPENSATION REPORTS, 59
UNEMPLOYMENT INSURANCE, 59
UTILITY USAGE LOG. *SEE* EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS
UTILITY USAGE LOGS. *SEE* PHONE LOGS
UTILITY USAGE LOGS AND BILLS. *SEE* ACCOUNTS PAYABLE

V

VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS. *SEE* EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS
VEHICLE MILEAGE LOG. *SEE* EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS
VEHICLE REFERENCE RECORDS, 7
VEHICLE REGISTRATION CARDS, 22
VEHICLE TITLES, 74
VEHICLE USAGE RECORDS, 7
VENDORS, 35
VERIFICATION OF EMPLOYMENT RECORDS, 59
VETERANS COMMISSION QUARTERLY REPORTS. *SEE* REPORTS AND STUDIES
VOIP RECORDS, 66

VOLUNTEER RECORDS, 59
VOUCHERS. *SEE* ACCOUNTS RECEIVABLE

W

W-2 FORMS. *SEE* TAX FORMS

W-4 FORMS. *SEE* TAX FORMS

WARRANTIES. *SEE* EQUIPMENT AND VEHICLE
MAINTENANCE, REPAIR, AND INSPECTION
RECORDS

WEB MANAGEMENT AND OPERATIONS RECORDS
STRUCTURE, 66

WEBSITE (ELECTRONIC), 79

WORK ORDERS, 22

WORK SCHEDULES AND ASSIGNMENT RECORDS,
EMPLOYEE, 60

WORKERS' COMPENSATION PROGRAM
ADMINISTRATION, 60

WORKERS' COMPENSATION PROGRAM CLAIMS, 60

WORKFORCE DEVELOPMENT

\LOCAL AREA JOB TRAINING PLAN RECORDS, 86

WORKFORCE DEVELOPMENT

\AUDIT/AUDIT RESOLUTIONS, 86

WORKFORCE DEVELOPMENT

\PARTICIPANT RECORDS, 86

WORKFORCE DEVELOPMENT RECORDS, 86

WORKSHOPS, 76

RECORDS RETENTION AND DISPOSITION SCHEDULE

PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

CONTENTS

Approval	iv
Front Matter	
Executive Summary	v
Legend for Records Schedule	vi
Records Retention and Disposition Schedule	
Standard 10: Airport Authority Records	1
Standard 11: Animal Services Records	3
Standard 12: Code Enforcement and Inspection Records	5
Standard 13: Emergency Medical Services and Fire Department Records	12
Standard 14: Parks and Recreation Records	16
Standard 15: Planning and Regulation of Development Records	19
Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records	25
Standard 17: Public Transportation Systems Records	31
Standard 18: Public Utilities and Environmental/Waste Management Records	34
Standard 19: Street Maintenance, Public Works, and Engineering Records	46
Standard 20: Law Enforcement Records (excluding Sheriff's Office)	53
Standard 21: Tax Records (for municipalities)	73
Appendix	
Managing Public Records in North Carolina	A-1
Audits, Litigation, and Other Official Actions	A-5
Transitory Records	A-6
Destruction of Public Records	A-8
Sample Destructions Log	A-10
Electronic Records: E-mail, Born Digital Records, and Digital Imaging	A-11
Geospatial Records	A-13
Security Preservation Record Copies	A-15
Disaster Assistance	A-17
Staff Training	A-18
Request Forms	
Request for Change in Records Schedule	A-19
Request for Disposal of Unscheduled Records	A-20
Request for Disposal of Original Records Duplicated by Electronic Means	A-21
File Plan	A-22
Index	A-23

Program Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 Program Records Schedule: Local Government Agencies**:

10. Airport Authority Records
11. Animal Services Records
12. Code Enforcement and Inspection Records
13. Emergency Medical Services and Fire Department Records
14. Parks and Recreation Records
15. Planning and Regulation of Development Records
16. Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records
17. Public Transportation Systems Records
18. Public Utilities and Environmental/Waste Management Records
19. Street Maintenance, Public Works, and Engineering Records
20. Law Enforcement Records (excluding Sheriff's Offices)
21. Tax Records (for municipalities)

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

N.C. Gen. Stat. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, N.C. Gen. Stat. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends.*” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends.*” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends.*”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by these schedules; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.


Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. These schedules supersede previous versions of these schedules and any localized amendments; they are to remain in effect from the date of approval until they are reviewed and updated.

² Ibid.

APPROVAL RECOMMENDED


Municipal/County Clerk or Manager
Title: _____



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: _____



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

County/Municipality: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the *General Records Schedule: Local Government Agencies* and, therefore, are not listed separately here.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.
- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a [Request for Disposal of Unscheduled Records](#) (page A-19) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or Includes confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTIONS, page A-5.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 10: PROGRAM OPERATIONAL RECORDS – AIRPORT AUTHORITY RECORDS**

Official records and materials created and accumulated incidental to the operation of a county or municipal airport.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.01	ACCESS CONTROL RECORDS Records concerning employee or contractor access to facilities or resources.	Destroy in office 1 year after expiration.	
10.02	AIR SPACE CONSTRUCTION Applications to construct structures which may obstruct flight space. Includes correspondence and related records.	Destroy in office after 5 years.	
10.03	AIRFIELD INSPECTION Records concerning airfield inspections on runway conditions, fueling agents, fire and rescue facilities, ground vehicle control and other airport condition information.	Destroy in office after 1 year.	Authority/Retention: 14 CFR 139.301
10.04	AIRPORT MASTER RECORD Federal Aviation Administration (FAA) form 5010 documenting basic information concerning airports.	Destroy in office when superseded or obsolete.	

10: Airport Authority

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.05	LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS Records documenting local government and airport authority land use and development planning.	Retain in office permanently.	
10.06	RADIO LOGS Records of radio calls received and placed.	Destroy in office after 1 year.	

10: Airport Authority

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 11: PROGRAM OPERATIONAL RECORDS – ANIMAL SERVICES RECORDS**

Records created and received during the conduct of animal services programs.

NOTE: Some records are covered by General Records Schedule: Local Government Agencies and, therefore, are not listed separately here. See Reference (Reading) File and Reports and Studies (Administration and Management Records).



ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.01	ANIMAL ABUSE AND CRUELTY RECORDS Includes complaints, citations and/or compliance orders, and other related records.	Destroy in office after 5 years.*	See G.S. 14-360 for definition of animal cruelty.
11.02	ANIMAL COMPLAINT RECORDS Includes complaints of animal nuisances.	Destroy in office after 3 years.*	
11.03	ANIMAL CONTROL RECORDS Records of animal control calls. Includes information regarding animal bites, animals received from residents, strays caught, animals taken to shelter or returned to owner, use of tranquilizer guns, and other related records. Also includes citations and/or compliance orders issued to animal owners for violations of government ordinances.	a) Destroy in office records concerning dangerous animals when known dead or after 10 years. b) Destroy in office animal control citations and compliance orders after 3 years.* c) Destroy in office remaining records after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.04 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Confidentiality: G.S. 132-1.2 (2)
11.05 	ANIMAL SHELTER RECORDS Records of animals impounded at the shelter, including date of impoundment, length of impoundment, disposition of animal, and any other information required by rules adopted by the State Board of Agriculture. Also includes certificates of animal release (e.g., adoption, reclaim, transfer, return to field) and owner contact records.	Destroy in office 3 years after date of impoundment.	Authority/Retention: G.S. 19A-32.1(j) Confidentiality (for specific counties): G.S. 132-1.15
11.06	CONTROLLED SUBSTANCE EUTHANASIA LOG Includes amount of controlled substances used.	Destroy in office after 2 years.	Retention: 21 CFR 1304.04
11.07	HISTORIES OF PET OWNERS Records concerning information for each animal owner who violates government ordinances. Includes complaint forms and other related records.	Destroy in office after 3 years.*	
11.08	RABIES VACCINATION RECORDS Includes rabies vaccination certificates submitted to agency by area veterinarians.	Destroy in office after 3 years.	Authority: G.S. 130A-189

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.


± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 12: PROGRAM OPERATIONAL RECORDS – CODE ENFORCEMENT AND INSPECTION RECORDS**

Official records and materials created and accumulated during the conduct of local government code enforcement and inspection programs.

NOTE: Some records are covered by the General Records Schedule: Local Government Agencies and, therefore, are not listed separately here.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.01	AIR POLLUTION SOURCE INFORMATION Includes records for facilities which are no longer operational.	Destroy in office after 2 years.*	
12.02	 BLUEPRINTS AND SPECIFICATIONS Records concerning blueprints and specifications of local government owned buildings and facilities, or drawings submitted when applying for a building permit for new construction. Includes as-built plans and related records concerning approved changes or used in determining code compliance and enforcement of building code. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain agency blueprints and specifications for life of structure. b) Destroy in office commercial blueprints and specifications 1 year after completion of project. c) Destroy in office residential blueprints and specifications when reference value ends.± Agency Policy: Destroy in office after <u>7 years</u>	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “destroy when reference value ends.” Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.03	<p>BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS Records documenting applications for permits from property owners to erect new structures or manufactured homes, or to make structural modifications, demolition, fire permits, or the installation of plumbing, electrical, or mechanical systems. Includes permits, inspection reports, inspector's worksheets, inspection requests, denial reports, sketches, correspondence (including e-mail), and contractor change forms.</p>	<p>a) Destroy in office permits, applications, and inspection reports (or worksheets) 6 years after Certificate of Occupancy is issued or project is complete (inactive).</p> <p>b) Destroy in office Certificate of Occupancy 6 years after permit is expired.</p> <p>c) Destroy in office remaining records, including applications for which a permit was never issued, when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>90 Days</u></p>	
12.04	<p>CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS Records concerning decontamination compliance.</p>	Destroy in office 3 years after documented decontamination is complete.	
12.05	<p>DROUGHT CONTINGENCY PLANS Includes water conservation plans in the event of a drought.</p>	Destroy in office when superseded or obsolete.	
12.06	<p>EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES Includes settled legal matters and penalties.</p> <p>SEE ALSO: Violations: Building and Housing, below.</p>	Destroy in office 6 years after settlement.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.07	EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans as well as revisions and addenda.	a) Destroy in office approved plans 6 years after approval or last revision and/or addendum. b) Destroy in office non-approved plans after 3 years.	
12.08	EXEMPTION (VARIANCE) RECORDS Records concerning exemptions and variances concerned with the installation of water, sewer, gas, or electric lines.	a) Destroy in office 5 years after expiration.* b) Destroy in office records for which an exemption or variance was not issued after 3 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.09	GOING-OUT-OF-BUSINESS LICENSES Records concerning licenses granted to business to hold going out of business, water and smoke damage, and distress sales.	Destroy in office 1 year expiration.	
12.10	GROUNDWATER MONITORING RECORDS Includes all groundwater monitoring wells and associated groundwater surface elevations.	Destroy in office after 5 years.*	Authority: 15 NCAC 2C .0100
12.11	ILLEGAL DUMPING FILE Records concerning illegal dumping complaints received. SEE ALSO: Violations: Solid Waste Management, below.	Destroy in office after 5 years.*	
12.12	INSPECTIONS Inspections conducted by local government agencies concerning enforcement of state and local laws, codes, and ordinances.	Destroy in office after 6 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.13	LEAD AND COPPER COMPLIANCE RECORDS Includes all monitoring records required by federal, state, and local regulations.	Destroy in office after 12 years.*	Retention: 40 CFR 141.91
12.14	LANDFILL TONNAGE AND COST FILE	Destroy in office after the 5 year reporting period is complete.	
12.15	PERMITS: CONSTRUCTION Records documenting applications and permits regarding sign installation, fencing, swimming pools, driveways, or similar activity required by local ordinance. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Miscellaneous (Non-Building) Applications, Licenses, and Permits (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 3 years after completion of project. b) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>90 Days</u>	
12.16	 PERMITS: PUBLIC UTILITIES PROJECTS Records documenting permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain in office approval letters and supporting documentation permanently. b) Destroy in office permits 6 years after expiration, cancellation, revocation, or denial.*	Authority: 40 CFR 122.28 15A NCAC 18C .0300 Confidentiality: 15A NCAC 02H .0115

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.17	RECREATIONAL VEHICLE REGISTRATION RECORDS Records concerning issuance of registrations/decals for recreational vehicles. Includes, but is not limited to, golf carts, canoes, and mopeds as well as proof of insurance and renewals.	Destroy in office 1 year after expiration.*	
12.18	UNSAFE BUILDINGS FILE Records documenting inspections and notifications to owners of unsafe conditions relative to a particular structure. SEE ALSO: Violations: Building and Housing, below.	Destroy in office after 6 years provided all issues have been resolved.*	
12.19	VALVE OPERATION FILE	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>obsolete or superseded</u>	
12.20	VIOLATIONS: BUILDING AND HOUSING Records documenting violations of building and fire code, minimum housing, and erosion and sediment control. Includes complaints, summons, notices, appeals, and other information created or compiled during the course of investigation and resolution of each alleged violation. SEE ALSO: Water Analysis, below.	a) Destroy building code violations in office 6 years after verification of correction. b) Destroy remaining records in office 3 years after verification of correction.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.21	VIOLATIONS: SOLID WASTE MANAGEMENT Includes complaints, notices of violations, citations, investigation records, court documents, and other related records issued by solid waste environmental enforcement programs.	Destroy in office 7 years after resolution of case.*	
12.22	VIOLATIONS: WATER CONSERVATION Records concerning notices of water conservation violations.	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>1 year</u>	
12.23	WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS	Destroy in office after 5 years.*	Authority: 15A NCAC 2B .0505
12.24	WASTEWATER QUALITY ANALYSIS RECORDS	a) Destroy in office analysis reports after 3 years.* b) Destroy in office monitoring and calculation sheets after 1 year.*	Authority: 15A NCAC 2B .0505

12: Codes & Inspections

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.25	<p>WATER ANALYSIS Records concerning bacteriological, chemical, radiological, and physical analyses and climatological observations as well as records of actions taken to correct violations.</p> <p>SEE ALSO: Violations: Building and Housing and Violations: Water Conservations, above.</p>	<p>a) Destroy in office records of chemical and radiological analysis after 10 years.</p> <p>b) Destroy in office records of bacteriological and turbidity analysis after 5 years.</p> <p>c) Destroy in office records of actions taken to correct violations 3 years after last corrective action taken.</p> <p>d) Destroy in office remaining records after 5 years.</p>	<p>Retention: 40 CFR 141.33 15A NCAC 18C .1526</p>
12.26	<p>WATER SYSTEM OPERATIONS RECORDS Records concerning the operations of water supply, treatment, distribution, and collection. Includes backflow prevention reports, flow reports, capacity studies, pump station reports, and similar records that summarize</p>	<p>Destroy in office after 10 years.</p>	<p>Retention: 40 CFR 141.33 15A NCAC 18C .1526</p>
12.27	<p>WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS FILE</p>	<p>Destroy in office after 5 years.*</p>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.



± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 13: PROGRAM OPERATIONAL RECORDS – EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS**

Official records documenting the primary functions of emergency services programs and fire departments.

Footage from body-worn cameras is scheduled by the content captured or the purpose of the footage rather than by its format. Recordings may fit under FIRE INVESTIGATION CASE FILES, DISPATCH RECORDS AND RECORDINGS, PUBLICITY RECORDS (General Schedule), TRAINING AND EDUCATIONAL RECORDS (General Schedule), and other items as appropriate. Footage is only confidential if it fits within an item where confidentiality is conferred by state or federal statute.


ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.01 	911 COMMUNICATION RECORDS AND RECORDINGS Records documenting any communications made by the public with 911. Includes transcripts and recordings of 911 calls received, transcripts of text messages received by 911, and computer-aided dispatch (CAD) reports. SEE ALSO: Dispatch Records and Recordings, below AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS)	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.5 G.S. 132-1.4(c)(4) Retention: G.S. 132-1.4(i)
13.02 	AMBULANCE CALL REPORTS (ACR)/PATIENT CARE REPORTS (PCR) Records concerning equipment used, patient location, nature of call, vital signs and other physical signs, care rendered, medicine ordered, etc.	a) Transfer copy of report to the admitting hospital for inclusion into patient's medical record. b) Destroy original in office after 3 years.*	Confidentiality: G.S. 130A-12

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.03	BUILDING AND FIRE SAFETY SYSTEM PLANS Records concerning plans and fire safety systems of commercial, industrial, and government-owned properties.	Destroy in office when superseded or obsolete.	
13.04	 DISPATCH RECORDS AND RECORDINGS Records and recordings concerning activities during an emergency services dispatch. Includes company run reports and fire journals as well as ambulance dispatch and service run records. Also includes footage from body-worn cameras of EMS and Fire Department personnel when responding to an emergency if not otherwise included in a separate item. SEE ALSO: 911 Communication Records and Recordings, above AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS).	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.4 G.S. 143-518 45 CFR 164.501 42 U.S.C. 1395x
13.05	FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE Records documenting licenses and insurance certificates of companies that perform installations of fire alarm and automatic extinguishing systems.	Destroy in office when superseded or obsolete.	
13.06	FIRE DISPATCH FILE Records concerning fire dispatch zones. Includes maps of fire dispatch zones, census tract information, annexation research, street closings, and other related material.	Destroy in office when superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.07	<p>FIRE INVESTIGATION CASE FILES Records concerning investigations of fire. Includes reports, photographs, evidence, and other related records.</p> <p> SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Case File: Felonies AND Case File: Misdemeanors (STANDARD 20: LAW ENFORCEMENT RECORDS).</p>	<p>a) Retain in office permanently when loss of life occurs or if a publicly-owned building is involved.*</p> <p>b) Destroy in office after 10 years when arson is involved.*</p> <p>c) Destroy in office after 5 years when cause of fire is determined to be accidental and no loss of life occurs.*</p>	Confidentiality: G.S. 132-1.4
13.08	<p>FIRE SAFETY INSPECTIONS AND PERMITS Records documenting inspections of and permits issued for fire protection measures and procedures for systems and buildings.</p>	<p>a) Destroy in office inspections with no defects after 3 years.</p> <p>b) Destroy in office inspections with noted defects 3 years after defects are corrected.*</p> <p>c) Destroy in office permits 3 years after expiration.</p>	
13.09	<p>NORTH CAROLINA FIRE INCIDENT REPORT Includes report required by state statute to document certain fire incidents.</p> <p><i>For retention of copies of fire incident reports filed with other agencies, see: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Reports (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</i></p>	Retain original report permanently.	Authority/Retention: G.S. 58-79-45

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.10 	PHARMACEUTICAL AND NARCOTICS RECORDS Records documenting the administration of pharmaceuticals and narcotics to patients as required by the Drug Enforcement Agency.	Destroy in office after 3 years.*	Authority: 21 CFR 1310.03 Confidentiality: G.S. 130A-12 Retention: 21 CFR 1310.04

13: EMS & Fire Department

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 14: PROGRAM OPERATIONAL RECORDS – PARKS AND RECREATION RECORDS**

Records created and received by Parks and Recreation departments.


ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.01	ADMISSION RECORDS Records of admissions to parks or recreation facilities.	Destroy in office after 3 years.*	
14.02	CITATIONS RECORDS Citations issued by park personnel to persons who violate park rules and regulations.	Destroy in office after 2 years.	
14.03	OFFICIALS FILE Records concerning individuals who officiate games. Includes schedule and correspondence (including e-mail). SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) or Seasonal and Contract Worker Records (STANDARD 4: HUMAN RESOURCES RECORDS) for disposition of payment records.	Destroy in office after 3 years.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.04	<p>PARKS PLANNING FILE Records concerning master plans and working plans for each park property and recreational facility which show layout, topography, and proposed developments and improvements. Includes drainage and resource maps, aerial maps, site analysis drawings, construction plans, and as-built drawings.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS) AND GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Parks (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS (GIS) RECORDS).</p>	<p>a) If an element of the Strategic Plan, destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>Strategic Plan is approved</u></p> <p>b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.</p>	
14.05	<p>POOL RECORDS Records concerning monthly reports indicating operational data, chemicals used, chlorination levels and other information relating to pool construction, maintenance, and health and safety.</p>	Destroy in office after 1 year.	
14.06	<p>RECREATION PROGRAMS Records concerning athletic and recreation programs. Includes staff notes, lesson plans, course descriptions, instruction manuals, schedules, team rosters, reservation records, copies of receipts for fees paid, age verification records, and concession operators list.</p> 	<p>a) Destroy in office program records after 3 years.</p> <p>b) Destroy age verification records when reference value ends.± Agency Policy: Destroy in office after <u>60 Days</u></p>	Confidentiality: G.S. 132-1.12

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.07	TICKET STUBS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>1 Week</u>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 15: PROGRAM OPERATIONAL RECORDS – PLANNING AND REGULATION OF DEVELOPMENT RECORDS**

Official records and materials created and accumulated during the conduct of local government planning, regulation of development, and zoning programs.

Community Development Block Grants (CDBG) records are found in Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.01	BOARD OF ADJUSTMENT CASE FILES AND INDEXES Cases submitted to the board requesting variances from current zoning ordinances. Includes indexes to cases reviewed by the board.	a) Retain indices in office permanently. b) Destroy in office case files after 6 years.*	Retention: G.S. 1-50(5)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.02	<p>CERTIFICATES OF APPROPRIATENESS Certificates submitted by the Historic Preservation Commission allowing alterations to exterior portions of building and structures on or within historic landmarks and districts. Includes applications and other related records.</p>	<p>a) Retain in office certificates for life of structure and then destroy.</p> <p>b) Destroy in office denied applications when reference value ends. ± Agency Policy: Destroy in office after <u>90 Days</u></p> <p>c) Destroy in office remaining records when reference value ends. ± Agency Policy: Destroy in office after <u>90 Days</u></p>	<p>Authority: G.S. 160A-400.9</p>
15.03	<p>COMPREHENSIVE PLAN AND AMENDMENTS Official copies of comprehensive plan and all background surveys, studies, reports, draft versions of plans, and supporting documentation.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain in office permanently adopted plan and amendments.</p> <p>b) Destroy in office remaining records 3 years after adoption of plan.</p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.04	CONDITIONAL USE PERMIT RECORDS AND INDEX Records concerning applications for conditional use permits. Permits allow for the construction of buildings, on the condition that impacts on neighborhoods are mitigated. Includes original application, blueprint drawings, investigative reports, planning commission recommendations, cash receipts, and related correspondence (including e-mail). Also includes reference copies of variances or exceptions from zoning regulations granted by the Board of Adjustment.	a) Destroy in office 3 years after discontinuance of use. b) Destroy in office applications for which a permit was never issued when reference value ends. ± Agency Policy: Destroy in office after <u>90 Days</u>	
15.05	DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, COMMON AREAS, ETC.	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>filed with appropriate agency</u>	Authority: G.S. 47C-2-103
15.06	ENVIRONMENTAL IMPACT STUDIES Records and reports concerning the environmental impact of major projects proposed by localities and reviewed by local officials.	Retain in office permanently.	
15.07	OPEN SPACE CLASSIFICATION CASE FILE	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.08	PERMITS: TEMPORARY MANUFACTURED HOME Records created to temporarily authorize the location of a manufactured home on the same lot as a single family residence.	Destroy in office 6 years after permit expires.	Retention: G.S. 1-50(5)
15.09	PERMITS: ZONING COMPLIANCE For residential uses, non-residential uses, and accessory structures.	a) Retain in office permits concerning subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office permits concerning subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other permits and related records 6 years after last entry.	Retention: G.S. 1-50(5)
15.10	PETITION & REGULATION RECORDS	Destroy in office after 5 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.11	<p>PLANNING REVIEW CASE FILE For required review of site plan, zoning variance, special permit, change of zoning, subdivision creation or enlargement, municipal or county planning action, or other required review; including, but not limited to, maps, plans, sketches, photographs, engineering reports, environmental impact statement and studies, copies of zoning records, project narrative, correspondence (including e-mail), and record of final determination.</p>	<p>a) Retain plan reviews and related records containing subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently.</p> <p>b) Destroy in office plan reviews and related records containing subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry.</p> <p>c) Destroy in office any other mandatory reviews and related records 6 years after last entry.</p>	Retention: G.S. 1-50(c)
15.12	<p>REZONING RECORDS AND INDEXES Records concerning applications to rezone property within the county or municipality. Includes original applications, review forms, maps of areas involved, copies of investigative reports, copies of relevant planning board minutes, notices of hearings, and development agreements.</p>	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.13	<p>SUBDIVISION RECORDS Includes maps, plats, topographical data, names of streets, records of public utilities, action by council, etc. Also includes preliminary subdivision and group development site plans.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Plats (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS RECORDS).</p>	<p>a) If not filed in Register of Deeds or similar agency, retain in office permanently.</p> <p>b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± <div style="text-align: right;">filed with</div> Agency Policy: Destroy in office after <u>appropriate agency</u></p>	
15.14	<p>VARIANCES Includes zoning variances, watershed variances, and subdivision variances.</p>	Retain official copies permanently in the minutes of the Board of Adjustment or other governing body.	
15.15	<p>VIOLATIONS: ZONING Records concerning notices of zoning violations.</p>	Destroy in office after 6 years.*	Retention: G.S. 1-50(5)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



16: Public Housing

STANDARD 16: PROGRAM OPERATIONAL RECORDS – PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS

Official records and materials created and received by public housing authorities, redevelopment commissions, and entitlement communities operated by local government agencies. Where there is a local funding match required to qualify for grant programs, all records should be retained according to the grant requirements listed below.

NOTES: Some records, such as those for Section 8 assistance, are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here. See Bond Closing Records (Budget, Fiscal, and Payroll Records), Grants (Administration and Management Records), and Grants: Financial (Budget, Fiscal, and Payroll Records). 24 CFR Parts 50-58 lay out the environmental review responsibilities of entities but do not establish specific retention requirements, so these records should be handled in accordance with the requirements of the funding source.

ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.01	<p>APPRAISAL PROJECT FILE Evaluations of properties and structures within proposed projects. File includes financial assessments of the worth of real estate and building within proposed project areas. File may also include assessments of architectural and historical significance and condition of the involved structures and real estate.</p>	<p>a) Retain records with historical value permanently. b) Destroy in office remaining records 5 years after completion of abandonment of project.*</p>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.02	<p>COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS Records concerning the administration of projects funded under the Community Development Block Grant (CDBG) program, including both direct grants and regrants. Includes applications, reports, audits, certificates, maps, and other related records.</p>	<p>a) Retain records with historical value permanently. b) Destroy in office rejected applications after 1 year. c) Destroy in office remaining records 4 years after execution of the closeout agreement for the grant.</p>	Retention: 24 CFR 570
16.03	<p>COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES Records concerning individual activities under the Community Development Block Grant (CDBG) program for which there are outstanding loan balances, other receivables, or contingent liabilities. Includes reports, audits, and other related records.</p>	<p>a) For recipients, destroy in office 3 years after the receivables or liabilities have been satisfied. b) For subrecipients, destroy in office after such receivables or liabilities have been satisfied.</p>	Retention: 24 CFR 570.502(a)(7)(i)(B)
16.04	<p>COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY Records concerning real property which was acquired or improved in whole or in part using Community Development Block Grant (CDBG) funds. Includes reports, audits, and other related records.</p>	<p>a) For recipients, destroy in office 3 years after these provisions no longer apply to the activity. b) For subrecipients, destroy in office when these provisions no longer apply to the activity.</p>	Authority: 24 CFR 570.503(b)(7) 24 CFR 570.505 Retention: 24 CFR 570.502(a)(7)(i)(B)


16: Public Housing

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.05	CONTINUUM OF CARE RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes required Federal compliance records, program records, financial records, and other related records.	a) Destroy in office records documenting the acquisition, new construction, or rehabilitation of a project site 15 years after the date site is first occupied/used. b) Destroy in office program participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. c) Destroy in office all remaining records after 5 years.	Retention: 24 CFR 578.103(c)
16.06	 CRIMINAL RECORDS CHECKS Records received by the local agency to screen applicants for admission to covered housing programs and for lease enforcement or eviction.	Destroy in office once the purpose for which the record was requested has been accomplished, including expiration of the period for filing a challenge to the PHA action without institution of a challenge or final disposition of any such litigation.	Confidentiality/ Retention: 24 CFR 5.903(g) 24 CFR 5.905(c)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.07 	EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes case management records for program participants, required federal compliance records, program records, financial records, and other related records.	a) Destroy records supporting the expenditure of federal funds passed through NC Department of Health and Human Services (DHHS) on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records documenting renovation of an emergency shelter 10 years after the date that ESG funds are first obligated for the renovation. c) Destroy in office participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. d) Destroy in office all remaining records after 5 years.	Confidentiality: 24 CFR 576.500(x) Retention: 24 CFR 576.500(y)
16.08	FAÇADE PROJECT FILES Records documenting the re-granting of funds received by the agency to restore exteriors of architecturally important structures in project areas. Includes contracts, photographs, and correspondence.	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.09	<p>HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes records concerning designation as a participating jurisdiction, program records, project records, Community Housing Development Organizations records, financial records, program administration records, records concerning other federal requirements, and other related records.</p>	<p>a) Destroy in office rental assistance records 5 years after termination of assistance.* b) Destroy in office written agreements 5 years after termination.* c) Destroy in office 5 years after the affordability period terminates records of individual tenant income verifications, projects rents and inspections, and documents imposing recapture/resale restrictions. d) Destroy in office records covering displacements and acquisition 5 years after final payment.* e) Destroy in office remaining records after 5 years.*</p>	Authority/Retention: 24 CFR 92.508
16.10	<p>HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes verifications of disability, grant agreements, performance reports, and other related records.</p>	Destroy in office 5 years after the end of the grant term.	Retention: 24 CFR 582.301(c) 24 CFR 583.305(c)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.11	HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes grant agreements, performance reports, and other related records.	Destroy in office after 5 years.	Authority/Retention: 24 CFR 574 24 CFR 5.106(d)
16.12	LANDLORD MONITORING RECORDS Records documenting monitoring of landlords of properties used in affordable or subsidized housing programs. Includes certifications and forms and other compliance-related records.	Destroy in office after 5 years.	
16.13	REDEVELOPMENT PLANS Records concerning redevelopment projects. Includes documentation of the review and certification process.	a) Retain in office permanently records concerning approved redevelopment projects. b) Destroy in office remaining records 2 years after rejection.	

16: Public Housing

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 17: PROGRAM OPERATIONAL RECORDS – PUBLIC TRANSPORTATION SYSTEMS RECORDS**

Records received and created by area transit systems and authorities necessary to meet all statutory requirements.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

Comply with requirements of the Federal Transit Administration’s **Best Practice Procurement Manual**, Master Agreement MA(11) Section 8 manual.

ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.01	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS Includes driver’s daily assignments, dispatch records, logs of passenger pick-ups and drop-offs, manifests, trip requests, and appeal forms.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.02	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS Vouchers submitted by private transportation companies for reimbursement for alternative transportation of public transit clients.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.03	AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS	Destroy in office after 1 year.	Authority: 2 CFR 200.333

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.04	APPLICATIONS FOR ART-IN-TRANSIT Applications and supporting documentation submitted by regional and national artists for exhibit on agency property.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years after project end</u>	
17.05	APPLICATIONS FOR DISCOUNT PASSES Applications, certificates of disability, and supporting documentation used to apply for discount passes.	Destroy in office 3 years after service is terminated or denied.	
17.06	APPLICATIONS FOR TRANSIT SERVICE Includes customer applications, eligibility assessment records, correspondence (including e-mail), health information, riders' guides, and related records.	Destroy in office 3 years after service is terminated or denied.	
17.07	CUSTOMER (RIDER) IDENTIFICATION RECORDS Records concerning customer identification, approvals, denials, and related information.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
17.08	DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS Includes company's articles of incorporation, financial statements, signed affidavits, letters of reference, declarations, Federal Schedule A or B, and related correspondence (including e-mail).	a) Destroy in office company-specific records 5 years after company is removed from certified list. b) Destroy in office related DBE program records, including Federal Transit Administration reports, 5 years from date record was created.	Authority: 2 CFR 200.333
17.09	OPERATOR SHIFT INSPECTION RECORDS Reports and similar records of operator's inspections of vehicle at the beginning and end of shift.	Destroy in office after 5 years.	Authority: 2 CFR 200.333

17: Public Transportation

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.10	ROUTE HISTORY RECORDS Includes descriptions of routes, bus stops, passenger lists, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
17.11	SEAT BELT AND RESTRAINT SYSTEM RECORDS Records concerning the use and installation of seat belts and other restraint systems in vehicles.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>Retain for the life of the vehicle</u>	
17.12	TRANSIT SCHEDULES Printed route schedules and related information used to generate schedules.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year after route change</u>	
17.13	VANPOOL DRIVER APPLICATIONS Applications and supporting records submitted by persons operating vanpool vehicles.	a) Destroy in office accepted applications 3 years after person leaves program. b) Destroy in office applications for persons not accepted for program after 1 year.	

17: Public Transportation

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 18: PROGRAM OPERATIONAL RECORDS – PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS**

Official records and materials created and accumulated for use by municipal and county sanitation, water, sewage, electrical, and gas operations. Also contains environmental management records accumulated for use by erosion and sediment control, flood control, and monitoring of pollution. Comply with applicable provisions of G.S. §132-1.7 regarding confidentiality of public infrastructure detailed plans and drawings.

ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.01	ENVIRONMENTAL: COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>Strategic Plan is approved</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Authority: G.S. 130A-309.09A
18.02	ENVIRONMENTAL: CUSTOMER USAGE RECORDS Includes reports, plans or similar records submitted by industrial users or publicly-owned treatment works concerning intended or actual use of the wastewater treatment system.	Destroy in office after 3 years.*	Retention: 40 CFR 403.12(o)(3)
18.03	ENVIRONMENTAL: DAILY DISPOSAL TICKETS Record and/or receipts concerning the disposal of materials at the landfill.	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.04	<p>ENVIRONMENTAL: DISCHARGE MONITORING REPORTS Includes discharge and non-discharge monitoring reports submitted to state and/or federal regulatory agencies. Also includes copies of monthly reports required by National Pollution Discharge Elimination System (NPDES) permits.</p>	<p>a) Destroy in office NPDES reports 5 years from date of submission.*</p> <p>b) Destroy in office annual reports 5 years from date of submission.*</p> <p>c) Destroy in office daily reports after 3 years.</p>	<p>Retention: 40 CFR 122.41(3)(j)(2) 15A NCAC 2B .0506</p>
18.05	<p>ENVIRONMENTAL: LANDFILL MONITORING REPORTS Gas and groundwater monitoring records and reports.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Retain official reports permanently.</p> <p>b) Destroy in office remaining records after 3 years.</p>	<p>Retention: 15A NCAC 13B .1626(10)</p>
18.06	<p>ENVIRONMENTAL: LANDFILL OPERATIONAL PLAN Describes the intended schedule of construction, description of on-site waste handling procedures during active life of the facility, contingency plans, description of maintenance of installed equipment, and any other information pertaining to the operation, maintenance, monitoring, or inspections as may be required by federal and state law.</p>	<p>Destroy when superseded or obsolete.*</p>	<p>Authority: G.S. 130A-309.09D</p>

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.07	ENVIRONMENTAL: LANDFILL PERMITS Permits and related records of landfills owned or operated by agency. Includes amendments and hazardous waste management permits.	a) Retain construction and operation permit for life of system and then destroy. b) Destroy in office all other permits and related records after the 5-year reporting period is complete.	Retention: G.S. 130A-294 (b1) (4)
18.08	ENVIRONMENTAL: NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE Notices issued by agency concerning improper non-stormwater discharge or disposal. Includes improper disposal of waste or products, chlorinated pool discharge, vehicle maintenance facility runoff, food service waste, and other unregulated commercial and industrial discharges.	Destroy in office one year after resolution.	
18.09	ENVIRONMENTAL: OUTSIDE WASTE CLEARANCE RECORDS Records allowing parties outside the operator's jurisdiction to dispose of waste at landfill.	Destroy in office 3 years after expiration of agreement.	
18.10	ENVIRONMENTAL: REPORTS SUBMITTED TO U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA)	Destroy in office after 2 years.*	
18.11	EROSION CONTROL: EROSION AND SEDIMENT AFFIDAVITS Forestry and agricultural affidavits clarifying land use exempt from land-disturbing activity standards.	Destroy in office after 6 years.	

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.12	EROSION CONTROL: EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>3</u> years	
18.13	EROSION CONTROL: EROSION AND SEDIMENT CONTROL INSPECTIONS Inspections conducted by agency. Includes inspection requests, notices of violations, denial reports, sketches, plans, correspondence (including e-mail), and similar records concerning the construction, modification or demolition of existing and new roads and construction sites.	Destroy in office 6 years after final site inspection.*	
18.14	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PERMITS Records concerning permits, including permit logs, issued for site construction.	a) Destroy in office records concerning approved permits 3 years after expiration of permit. b) Destroy in office non-approved permits after 3 years.	
18.15	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans submitted to agency. Includes revisions, addendums, and records delineating who is financially responsible for the project.	a) Destroy approved plans in office 3 years after expiration. b) Destroy non-approved plans after 3 years.	Authority: 15A NCAC 04B .0118

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES





ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.16	<p>EROSION CONTROL: TROUT BUFFER VARIANCES Includes denials and waivers.</p> <p>SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Variances (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).</p>	<p>a) Destroy in office 6 years after approval of permit.</p> <p>b) Destroy in office after 3 years plans for which a permit was not issued.</p>	<p>Authority: 15A NCAC 04B .0125</p>
18.17	<p>FLOOD CONTROL: FLOOD CERTIFICATIONS Records concerning lot reviews for construction projects submitted to agency.</p> <p>SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Permits: Zoning Compliance (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).</p>	<p>Destroy in office when superseded or obsolete.</p>	
18.18	<p>FLOOD CONTROL: FLOOD STUDIES Reviews of stream crossings for construction projects submitted to agency.</p>	<p>Retain in office for life of structure and then destroy.*</p>	
18.19	<p>UTILITIES: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS Records concerning water distribution and treatment.</p>	<p>a) Destroy in office records concerning the operation of wastewater treatment facilities after 5 years.*</p> <p>b) Destroy in office records concerning the operation of water treatment facilities after 3 years.*</p>	<p>Authority: 15A NCAC 18C .1301</p>

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.20 	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS Includes authorizations to construct, building plans, and specifications of privately owned utilities.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>Strategic Plan is approved</u></p> <p>b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.</p>	Confidentiality: G.S. 132-1.7
18.21	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute and issued by agency.</p>	<p>a) Destroy in office permits 5 years after expiration, cancellation, revocation or denial.*</p> <p>b) Retain approval letters and supporting documentation permanently.</p>	
18.22	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS Records documenting installation, location, specifications, and maintenance history of meters, lines, pipes, pumps, and similar system equipment.</p>	Destroy in office 3 years after equipment is no longer owned and/or operational.	
18.23 	<p>UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Retain in office for life of system and then destroy.	Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.24	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS	a) Retain project pre-approval and final approval letters for life of system and then destroy. b) Destroy in office remaining records 5 years after project is completed.	
18.25	UTILITIES: LANDLORD AGREEMENTS Agreements to automatically transfer utility accounts to landlords when their tenant vacates a property.	Destroy in office 3 years after expiration of agreement.	
18.26	 UTILITIES: MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS) Includes maps, plats, charts, and similar records showing the location of water mains, valves, hydrants, meters, etc., throughout the system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps, All Other (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS).	Retain for life of system and then destroy.	Authority: 15A NCAC 18C .0300 Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.27	UTILITIES: METER INSTALLATION, TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS) Includes records concerning the installation or planned installation of meters and connecting any facility to utility system owned or operated by the agency.	a) Destroy in office records verifying installation of meter 3 years after equipment is no longer owned and/or operational. b) Destroy in office notice to property owners of approval of utility installation after 2 years. c) Destroy in office remaining records after reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
18.28	UTILITIES: PUBLIC UTILITIES INSPECTION FORMS Records relating to the inspection of sanitation, electric, water, gas and sewer utilities submitted to or conducted by agency.	Destroy in office when superseded or obsolete.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.29	 UTILITIES: PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS Includes records documenting installation, authorizations to construct, building plans, location, specifications, and maintenance history, for hydrants, pipes, pumps, valves, and similar system equipment. Includes drainage system maintenance and repair records.	a) Retain in office as built plans and specifications for life of system and then destroy. b) Destroy in office 5 years after equipment is no longer owned and/or operational if unlike replacement occurred. c) Destroy in office 3 years after equipment is no longer owned and/or operational if like replacement occurred. d) Destroy in office background surveys, studies, reports, drafts, and other records when superseded or obsolete.	Authority: 15A NCAC 18C .0300 15A NCAC 2H .0115 Confidentiality: G.S. 132-1.7
18.30	UTILITIES: RECYCLING WATER RECORDS Backwash recycling groundwater records.	Destroy in office when superseded or obsolete.	Authority: 40 CFR 141.76(d)
18.31	UTILITIES: SERVICE INTERRUPTION RECORDS Includes reports, logs, or similar records documenting service interruptions.	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.32	UTILITIES: TAP AND HOOK UP RECORDS Applications, permits, contracts, logs, or similar records documenting location and installation of water and wastewater hookup and taps.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office denied applications and remaining records when reference value ends. ± Agency Policy: Destroy in office after _____ 90 days	Confidentiality: G.S. 132-1.1(c)
18.33	UTILITIES: WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute for systems owned or operated by agency. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain approval letters and supporting documentation permanently. b) Destroy in office permits and other records 5 years after expiration, cancellation, revocation or denial.*	Retention: 15A NCAC 18C .0300 15A NCAC 2H .0115 40 CFR 122.28
18.34	UTILITIES: WASTEWATER MAINTENANCE OPERATION REPORTS	Destroy in office after 3 years.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.35	<p>WATER QUALITY: LABORATORY OPERATIONS RECORDS Includes documentation of all analytical quality control practices, reporting units, forms, test methods, and related procedures pertaining to certification obtained by agency.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy in office samples, raw data, analysis reports and related documentation after 5 years.*</p> <p>b) Destroy in office records concerning certification 2 years after expiration, cancellation, revocation, or denial.*</p>	<p>Authority: 15A NCAC 02H .0805(7)(G) 15A NCAC 02H .1100</p>
18.36	<p>WATER QUALITY: PRETREATMENT PROGRAM RECORDS Includes annual pretreatment reports, records of monitoring activities and results, water quality records and other related documentation.</p>	<p>a) Destroy in office permits and supporting documentation 5 years after expiration, cancellation, revocation, or denial.*</p> <p>b) Destroy in office remaining records after 3 years.*</p>	<p>Retention: 15A NCAC 02H .0908(f)(1) 40 CFR 503.17</p>
18.37	<p>WATER QUALITY: PUBLIC WATER SANITARY SURVEY RECORDS Includes reports, summaries, studies, correspondence (including e-mail), and other related records documenting the sanitary condition of system.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	<p>a) Destroy in office 10 years after completion of survey.*</p> <p>b) Destroy in office documentation of corrective measures 2 years after their implementation.</p>	<p>Retention: 40 CFR 141.33 15A NCAC 18C .1526</p>

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.38	WATER QUALITY: SEWER JETTING AND VECTORING RECORDS Records documenting the routine cleaning of wastewater lines.	Destroy in office after 3 years.	
18.39	WATER QUALITY: SLUDGE TREATMENT RECORDS Includes analyses, certification statements, site restrictions, monitoring records, vector attraction reduction requirements, trip tickets, residual records, control plans and other related documentation conducted by or for agency.	Destroy in office after 5 years.*	Retention: 40 CFR 503.17
18.40	WATER QUALITY: STORMWATER DEVIATION PERMITS Permits issued to single lots. Includes applications, certifications of installations, and related records.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office inspections submitted by owner when superseded or obsolete.	
18.41	WATER QUALITY: VIOLATION RECORDS Includes all documentation of actions taken to correct federal, state or local violations of water and wastewater management standards by agency.	Destroy in office after 5 years.*	Retention: 40 CFR 141.33 15A NCAC 18C .1526
18.42	WATER QUALITY: WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS Includes non-compliance inspections and test records conducted by a facility.	Destroy in office after 5 years.	

18: Public Utilities and Environmental/Waste

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

**STANDARD 19: PROGRAM OPERATIONAL RECORDS – STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS**

Official records and materials created and accumulated for constructing and maintaining municipal and county-maintained streets and other public works projects, and engineering records.


ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.01	<p>APPRAISAL REPORTS Records appraising privately owned land for compensation in eminent domain projects.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).</p>	Destroy in office after 10 years.	
19.02	<p>CEMETERY DEEDS Copies of deeds for the purchase of agency-owned cemetery plots. Includes applications or deed slips.</p>	<p>a) Retain 1 copy of deed in office permanently.</p> <p>b) Destroy in office remaining records when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>1 year</u></p>	
19.03	<p>CEMETERY INTERMENT RECORDS Includes name of deceased, date of interment, and location of plot.</p>	<p>Retain in office permanently.</p> <p><i>Retention Note: If these records are maintained as an electronic database, a copy should be maintained on paper or microfilm and updated regularly.</i></p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.04	EXCAVATION PERMITS Applications, permits, and billing information for individuals and contractors requesting to work in the county or municipal right-of-way for demolitions or excavations.	a) Destroy in office billing records after 3 years.* b) Destroy in office applications and permits 1 year after expiration. c) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>90 days after denial</u>	
19.05	GRAVE OPENING ORDERS Authorizations to dig graves in agency-owned cemeteries.	Destroy in office after 1 year.	
19.06	INFRASTRUCTURE MAINTENANCE RECORDS Records documenting the general maintenance and upkeep of infrastructure, including roads, traffic lights, and other public works.	Destroy in office after 3 years.	
19.07	PLANNING FILE Includes long-range and immediate plans for paving streets and other projects.	Destroy in office 5 years after superseded or obsolete.	
19.08	 PROJECT RECORDS - CANCELLED Background information for public works and engineering projects explored but not undertaken. Records are used as a reference file and include maps, project information, and the reason that the project failed.	a) Retain records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>90 days after cancellation</u>	Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.09 	<p>PROJECT RECORDS – CORE Records used to document the design and construction of public works and engineering projects. Includes final as-built plans and specifications; certificate of completion/closure; policy correspondence (including e-mail), covenants; final estimates and budgetary summaries; geo-technical reports; environmental mitigation agreements; permits for right-of-way use, photographs documenting key aspects of construction as-built; final specifications; and as-built structural calculations.</p>	<p>Destroy originals after life of structure ends.</p>	<p>Confidentiality: G.S. 132-1.7</p>


19: Streets, Public Works, and Engineering

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.10	<p> PROJECT RECORDS – ENGINEERING & COMPLIANCE Records used to document the engineering and technical areas of a public works and engineering project, as well as compliance with regulatory requirements. Includes superseded plans and specifications, agreements for construction and finance, billing information, change orders, force orders, work orders, construction claims, contract documentation, contracts, reports, diaries and narratives, EEO information, material certifications, material testing reports, notice to proceed, permit of entry, postings, pre-construction conference records, final progress payments, punch lists, regulations, shop drawings, and subcontractor information. File also includes environmental review records and proof of compliance with any mitigation measures required as a condition of project authorization.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.)</p>	Destroy in office 6 years after completion or termination of project.*	Confidentiality: G.S. 132-1.7

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES




ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.11	PROJECT SHEETS FILE Local forms listing property owners, lot or tract size, right-of-way data, tax value, and compensation.	Destroy in office after 5 years.	
19.12	RIGHT-OF-WAY ACQUISITION WORKING RECORDS Includes records of negotiations on acquisition of rights-of-way related to public works and engineering projects, such as 10-day letter of notification, notification of intent to acquire, notice of condemnation action, and other correspondence (including e-mail) relating to right-of-way acquisitions. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 3 years.*	
19.13	STREET NAME AND HOUSE NUMBER FILES Records relating to the assignment of street names and house numbers. May also include records documenting street name changes, and non-temporary street openings and closings.	Retain in office permanently.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.14 	<p>STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS Records used for maintenance, review, and analysis of permanent and temporary structures owned by third parties that extend, cross or abut the public right-of-way.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</p>	Destroy records pertaining to structure 3 years after the end of life of the structure.	Confidentiality: G.S. 132-1.7
19.15	<p>SURVEY FIELD RECORDS Records used to document and establish easements and rights-of-way, and to locate reference points used during street and utility projects. Records include traverse information, tie sheets, sketches, field notes, plats, interpretation of field notes, alignments, profiles of projects, plans, grade sheets, estimates, databank ties, and other miscellaneous documents used to establish grades, rights-of-way and easements.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).</p>	<p>a) Retain records with historical value permanently.</p> <p>b) Destroy in office remaining records when superseded or obsolete.</p>	
19.16	<p>TRAFFIC ANALYSIS Analysis of vehicle traffic within agency jurisdiction.</p>	Destroy in office after 5 years.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.17	TRAFFIC VIDEO RECORDINGS AND DATA Recordings and other data used to monitor traffic levels.	Destroy in office after 30 days.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

STANDARD 20: PROGRAM OPERATIONAL RECORDS - LAW ENFORCEMENT RECORDS (EXCLUDING SHERIFF'S OFFICES)

Records received and created by any local government law enforcement agency (excluding sheriff's offices) necessary to meet all statutory requirements. Comply with applicable provisions of G.S. §132-1.4 regarding confidentiality of law enforcement records and G.S. §153A-98 and G.S. §160A-168 regarding confidentiality of personal information of law enforcement officers.



Please note: Records created by county sheriff's offices fall under the purview of the Records Retention Schedule of County Sheriff's Offices.

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.01	ALARM CALL REPORTS Reports completed by officers responding to alarm calls. Includes listings of alarm type, time received, time arrived, reason for activation, and other related information. Includes forms completed by businesses and residences naming emergency contacts, location of safe, or other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	
20.02	ALTERNATIVE SENTENCING PROGRAMS Records documenting alternative sentencing programs. Includes work release and weekender service.	Destroy in office 3 years after individual leaves program.	
20.03	 ARREST PROCESSING RECORDS Records used to track a defendant's time and activities while in arrest processing. Includes time of arrival and time to and from each workstation.	Destroy in office 1 year after date of arrest.*	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.04 	ARREST REPORTS Reports concerning arrests made by officers.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 5 years from date of arrest if report is not made part of a case file.	Confidentiality: G.S. 132-1.4
20.05	AUCTION RECORDS Records concerning abandoned and unclaimed articles or found property in possession of law enforcement sold at public auction. May include auction receipts of monies received for items sold.	Destroy in office after 3 years.*	
20.06 	CASE FILE: FELONIES Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure report, statements of seized and returned property, interview sheets; case status reports, photographs, court orders, correspondence; officer's notes, court dispositions, audio or video recordings, and other related records. SEE ALSO: Electronic Recordings of Interrogations, below.	a) Destroy in office records concerning solved cases 20 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved cases until solved, and then follow disposition instructions in part (a).	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.07 	<p>CASE FILE: MISDEMEANORS Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure reports, statements of seized and returned property, interview sheets, case status reports, photographs, court orders, correspondence, officer's notes, court dispositions, audio or video recordings, and other related records.</p>	<p>a) Destroy in office records concerning solved malicious misdemeanor cases 3 years after disposition of case and exhaustion of any appeals.*</p> <p>b) Retain in office records concerning unsolved malicious misdemeanor cases until solved, and then follow disposition instructions in part (a).</p> <p>c) Destroy in office records concerning all misdemeanor cases not covered in (a) or (b) after 3 years.*</p>	Confidentiality: G.S. 132-1.4
20.08 	<p>COMMUNICATION RECORDS Recordings, printouts, and logs of telephone, radio, dispatch, 911 emergency calls or texts, and computer aided dispatch (CAD) systems incoming and/or outgoing communications. Includes time and date of call, contents of call, location of call, name of unit sent to scene, and other related information.</p> <p>SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, 911 Communication Records and Recordings AND Dispatch Records and Recordings.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 30 days if not made part of a case file.</p>	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.09 	COMPLAINTS Records concerning complaints to which a unit responded. Includes logs listing name and address of victim, time, date, nature of complaint, responding officer's name, action taken, and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 3 years after resolution if not made part of a case file.	Confidentiality: G.S. 132-1.1(a)
20.10	COMPOSITE INTERVIEWS Summaries of interviews used to determine the physical description of suspects.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	
20.11 	CRIME ANALYSIS RECORDS Records used to anticipate, prevent, or monitor possible criminal activity. Includes crime reports, photographs, complaints, copies of citations, criminal profile information, and interoffice memoranda generated or accumulated in connection with investigations or directed patrols.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: G.S. 132-1.4 G.S. 132-1.7(a2) Authority/ Confidentiality/ Retention 28 CFR 23.20

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.12 	<p>DETENTION FACILITY INCIDENT REPORTS Detention facility incident reports. Include narratives of incidents, lists of those involved, statements and interview reports, inmates' refusal of medical treatment, inmates' refusal to press charges, and other related records.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Litigation Case Records (STANDARD 6: LEGAL RECORDS).</p>	<p>c) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>d) Destroy in office after 3 years if not made part of a case file.*</p>	Confidentiality: G.S. 132-1.1(a)
20.13	<p>DETENTION FACILITY OPERATIONAL RECORDS Records concerning all activities occurring during shifts at detention facilities. Includes end of duty (shift change reports, key and radio control lists, equipment and inmate/non-inmate housing check lists, cell inspection reports, laundry exchange and controlled property lists, tour reports, etc.) and inmate accountability (rosters, commitment and release reports, cell locations, etc.) records.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u></p>	
20.14	<p>DETENTION FACILITY PHYSICAL FORCE RECORDS Reports made by any officer or employee of a detention facility who applies physical force to an inmate or arrestee.</p>	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.15	<p>DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES</p> <p>Records and logs listing entries and inquiries made against DCI-NCIC networks and concerning missing persons, wanted persons, stolen vehicles or other property, and other related topics.</p>	Destroy in office 1 year after period covered by audit.*	Authority: 28 USC 534
20.16	<p>DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS</p> <p>Requests and proofs of verification for DCI-NCIC or other law enforcement information networks.</p>	Destroy in office after 1 year.*	Authority: 28 USC 534
20.17	<p>DNA SAMPLING RECORDS</p> <p>Records documenting the collection of DNA samples from persons for qualifying offenses. Includes copies of judgments. Original samples are forwarded to the State Crime Lab.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office 1 year from date sample was obtained if not made part of a case file.</p>	Authority: G.S. 15A-266.8

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.18 	DOMESTIC VIOLENCE RECORDS Restraining orders and related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after expiration of restraining order if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.19	DRUG AND ALCOHOL TESTING RECORDS Records and reports generated when individuals suspected of being under the influence of or impaired by illegal drugs or alcohol are chemically tested. Includes reports used for persons arrested for driving while impaired by alcohol and/or drugs and breathalyzer analysis reports. SEE ALSO: Laboratory Case Records, below.	a) Transfer original Driving While Impaired (DWI) reports to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.20 	ELECTRONIC RECORDINGS OF INTERROGATIONS Electronic recordings generated by audio and/or video recording devices of custodial interrogations in an investigation of a juvenile or any person in a criminal investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 Days</u>	Authority: G.S. 15A-211 Confidentiality: G.S. 7B-3001(b) G.S. 132-1.4A
20.21 	FIELD OBSERVATIONS Records concerning field observations of suspicious persons or vehicles. Includes subject's name, address, and physical description; date, time, and location of occurrence; reason for stop; name of officer conducting interview; and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: G.S. 132-1.4

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.22	<p> FINGERPRINT CARDS Records used to verify a subject's identity. Includes fingerprints and all necessary information required to identify an individual. Also includes records of latent finger and palm prints that were found at the scene of a crime without identification of suspects</p> <p><i>Original fingerprint records are forwarded to the State Bureau of Investigation.</i></p> <p>SEE ALSO: Juvenile Case History Identification Records, below.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 3 years if not made part of case file.</p>	<p>Confidentiality: G.S. 132-1.4</p> <p>Authority: G.S. 15A-502</p>
20.23	<p>FORCIBLE ENTRY RECORDS Records concerning forcible entries made by law enforcement personnel.</p>	Destroy in office after 1 year.	
20.24	<p>FUGITIVE WARRANTS CASE RECORDS Records concerning fugitive warrants sent to a department from another jurisdiction requesting assistance in finding an individual. Includes fugitive profile and warrant.</p>	<p>Destroy in office when reference value ends.±</p> <p>Agency Policy: Destroy in office after _____ 30 days _____</p>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.25 	<p>IDENTIFICATION PHOTOGRAPHS Photographs (mugshots) of persons arrested in association with formal investigations. Also includes driver's license photos or negatives.</p> <p>SEE ALSO: Juvenile Case History Identification Records, below.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 3 years if not made part of a case file.</p>	Confidentiality: G.S. 132-1.4
20.26	<p>INCIDENT RESPONSE REPORTS Reports completed by officers responding to incidents. Includes victim, suspect, and witness information; damaged and stolen property reports; statement sheets; Miranda waiver forms; and other related records.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office when reference value ends if not made part of case file.±</p> <p>Agency Policy: Destroy in office after <u>30 days</u></p>	Confidentiality: G.S. 132-1.4
20.27	<p>INMATE CLASSIFICATION RECORDS Records concerning classification information gathered by the detention facility while inmates are incarcerated. Also includes incident reports, behavioral or disciplinary reports, interviews, classification level assigned, requested housing moves, and other related records.</p>	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.28	INMATE COMMITMENT RECORDS Copies of judgment and commitment papers received from the Clerk of Superior Court's office used to validate time spent incarcerated.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	
20.29	INMATE DEATH REPORTS Reports filed by office upon the death of an inmate. A report must be sent to the county health director and N.C. Department of Health and Human Services, within five days of the death.	Destroy in office after 3 years.*	Authority: G.S. 153A-224(b)
20.30	INMATE FINANCIAL RECORDS Records concerning individual inmate funds maintained by a detention facility for use by the inmate while incarcerated. Includes balance sheets listing inmate's name and number, amount of funds, dates of deposits and withdrawals, and other related information.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.31 	INMATE GRIEVANCE RECORDS Records concerning grievances filed by inmates and actions taken.	a) If legal action is taken and case adjudicated, destroy in office 5 years after final disposition. b) If legal action is taken and case non-adjudicated (out-of-court claims), destroy in office 5 years after final disposition or expiration of relevant statute of limitations. c) Destroy remaining records in office 3 years after inmate is released or transferred from the facility.*	Confidentiality: G.S. 132-1.1(a)
20.32	INMATE MAIL, TELEPHONE, OR VISITOR RECORDS Records concerning telephone calls and mail sent and received by inmates and individuals visiting inmates confined in county or municipal detention facilities. Includes logs listing inmate's name, date and time of call or mail, visitor's signature and address, and other related information.	Destroy in office after 1 year.*	
20.33	INMATE MEAL RECORDS Records concerning the planning and scheduling of inmate meals. Includes food service daily shift reports, daily meal sheets, food order forms, kitchen checklists, lists of inmates receiving meals and other related records. File also includes records concerning requests for special diets made by inmates.	Destroy in office after 3 years.*	Retention: 10A NCAC 14J .1723

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.34	 <p>INMATE MEDICAL RECORDS Records concerning medical examinations, diagnoses, and treatments of inmates. Includes medical information sheets and screening forms, medical histories as provided by inmate, receipt and/or release forms for medications and medical articles, laboratory and x-ray reports, blood pressure records, sick bay transfer forms, special diet authorizations, psychological evaluation forms, suicide watch sheets, progress notes, health assessment forms, dental forms, doctors' orders, transportation records to outside clinics or hospitals, and other related records. May also include authorization records for release of medical information to detention facility staff, informed consent forms, refusal of treatment forms, and release of financial responsibility forms.</p> <p>SEE ALSO: Juvenile Detention Records, below.</p>	Destroy in office 10 years after inmate's release or parole.	Confidentiality: G.S. 8-53 45 CFR 164.502
20.35	<p>INMATE PERSONAL IDENTIFICATION RECORDS Records concerning changes to be made to an inmate's incarceration file. Includes personal identification changes, superior court calendar, long form dismissals and other related records.</p>	Destroy in office 30 days after receipt.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.36	INMATE RESEARCH REQUESTS Requests filed by inmates seeking use of a facility's law library or similar collection containing research materials.	Destroy in office 1 year from date of request.	
20.37 	JUVENILE CASE FILES Includes incident and arrest reports, detention orders, disposition instructions, name and address of person having legal and/or physical custody of child, correspondence with county, municipal, or state juvenile services, and other related records.	a) Destroy in office records when juvenile reaches 21 years of age if adjudicated for an offense that would have been a Class A, B1, B2, C, D, or E felony if committed by an adult. b) Destroy in office records related to all other cases when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b) Retention:
20.38 	JUVENILE CASE HISTORY IDENTIFICATION RECORDS Includes fingerprints and photographs.	a) Transfer to the State Bureau of Investigation and Federal Bureau of Investigation. b) Destroy in office agency copies when reference value ends.*± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality/ Retention: G.S. 7B-2102
20.39 	JUVENILE DETENTION RECORDS Records concerning medical and non-medical information gathered on juvenile inmates held in county or municipal detention facilities.	a) Destroy in office medical records when juvenile reaches 30 years of age. b) Destroy in office non-medical records when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.40 	LABORATORY CASE RECORDS Records concerning cases examined in a crime laboratory; includes reports, notes, charts, and other related records	Retain in office permanently.	Confidentiality: G.S. 132-1.4
20.41 	LAW ENFORCEMENT AUDIO AND VIDEO RECORDINGS Tapes and digital recordings generated by mobile and fixed audio and video recording devices. Does not include Electronic Recordings of Interrogations, above.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4A G.S. 153A-98
20.42	MULTIPLE FIREARMS SALES REPORTS Reports received from dealers reporting the sale of multiple firearms.	Destroy in office when reference value ends, but within 20 days after receipt.± Agency Policy: Destroy in office after <u>30 days</u>	Retention: 18 USC 923(g)(3)(b)
20.43	MULTIPLE FIREARMS SALES REPORTS DESTRUCTION RECORDS Records submitted after 6 months to the U.S. Attorney General's Office certifying that all multiple firearm sales reports received from dealers have been destroyed.	Destroy in office after 1 year.	Authority: 18 USC 923(g)(3)(b)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.44	ORDINANCE VIOLATIONS CITATIONS Citations issued for violations of municipal and county ordinances.	Destroy in office after 3 years.*	
20.45	PAWNSHOP RECORDS Pawnshop cards and property records submitted to municipal and county law enforcement offices.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	Authority: G.S. 66-391
20.46	PERMISSION TO SEARCH RECORDS Authorizations for officers to search property, and if necessary, confiscate property deemed pertinent to an investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of a case file.± Agency Policy: Destroy in office after <u>30 days</u>	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.47 	PERMITS: CONCEALED WEAPONS AND HANDGUNS Applications and supporting documentation filed to carry concealed weapons or purchase handguns. Includes background checks and other related records.	<ul style="list-style-type: none"> a) Destroy in office all approved applications after 5 years. b) Destroy in office denied applications and related records 5 years from date of denial or resolution of petition filed with district court, whichever is longer. c) Destroy in office background checks and related records concerning approved applications when permit is issued. 	Authority/ Confidentiality: G.S. 14-415.17 G.S. 132-1.4 G.S. 132-1.7
20.48	PRISON RAPE ELIMINATION ACT (PREA) FILE Allegation, investigation, and incident review records documenting investigations into allegations of sexual abuse or sexual harassment.	Destroy in office 6 years after inmate's release.* <i>Retention Note: If a minor is involved in the incident, records should be retained until the minor reaches age 30.</i>	Authority: 28 CFR Part 115
20.49	PRISON RAPE ELIMINATION ACT (PREA) DATA FILE Aggregated data for every allegation of sexual abuse at county or municipal lockups.	Destroy in office after 10 years.	Authority/Retention: 28 CFR Part 115.187 28 CFR 115.189(d)
20.50	PRISONER TRANSPORT RECORD Verification forms completed by receiving party of prisoner patient.	Destroy in office after 1 year.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.51	<p>PROPERTY RECORDS Records concerning confiscated property, evidence, stolen or recovered property, and unclaimed property. Includes descriptions of property and its value, serial numbers, and other related records. Records may also be filed with original incident report.</p>	Destroy in office 3 years after final disposition of property.	
20.52	<p>PURSUIT LOGS Logs concerning pursuits by law enforcement personnel.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 3 years if not made part of a case file.</p>	
20.53	<p>RIDE-ALONG PROGRAM RECORDS Records concerning a law enforcement ride-along program.</p>	Destroy in office after 3 years.*	
20.54	<p>SEXUAL OFFENDER RECORDS Records concerning sexual offenders living within jurisdiction.</p>	<p>a) Destroy in office records of persons registered in the "Sexually Violent Predator Program" when individual is known dead or after 90 years.</p> <p>b) Destroy in office records of persons registered in the "Sex Offender and Public Protection Program" after court petition and review by the state; or after 30 years or length of court order, whichever is greater; or when individual is known dead.</p>	<p>Authority: G.S. 14-208</p> <p>Retention: G.S. 14-208.6A</p>

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.55	TRAFFIC ACCIDENT REPORTS Records concerning traffic accidents. Includes general correspondence, property receipts, collision reports, waivers signed by involved parties agreeing to settle damages among themselves, and other related records.	a) Transfer original collision report to the N.C. Division of Motor Vehicles within 10 days of accident. b) Destroy in office after 3 years records concerning accidents not meeting N.C. Division of Motor Vehicles reporting requirements, but for which a report was made. c) Destroy in office duplicate reports when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	Confidentiality: 18 USC 2721
20.56	 TRAFFIC CITATIONS AND WARNINGS Citations issued to drivers violating motor vehicle and traffic laws. Includes voided citations and warnings that do not require a fine or court appearance.	a) Transfer original citations to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy remaining records in office after 1 year.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.57	<p>TRESPASS RECORDS Authorizations by property owners, lessees, or managers for law enforcement officers to take action deemed appropriate to remove unauthorized persons and issue trespass warnings.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office 1 year after expiration if not made part of a case file.</p>	<p>Authority: G.S. 14-159.12-13</p>
20.58	<p>VEHICLE TOWING RECORDS Includes recovery authorizations and consent forms completed by owners to have vehicle towed, removed, stored, or left at the scene.</p>	<p>a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors</p> <p>b) Destroy in office after 1 year if not made part of a case file.</p>	



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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

STANDARD 21: PROGRAM OPERATIONAL RECORDS - TAX RECORDS (FOR MUNICIPALITIES)

Records received and created by a municipality for the purposes of collecting taxes. For County Tax Administration records, please refer to the separate County Tax Administration Program Schedule.

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.01 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals by the municipality. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Authority: G.S. 160A-212 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.02	BEER AND WINE TAXES AND RECORDS Records concerning the levy of privilege taxes on beer and wine.	Destroy in office after 3 years.*	Authority: G.S. 105-133.77-79
21.03 	BICYCLE LICENSE PLATE RECORDS Records concerning issuance of license plates for bicycles.	Destroy in office after 1 year.*	Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.04	<p>DELINQUENT TAXPAYER RECORDS Records concerning taxpayers who have not paid real and personal property taxes due, including unpaid notices.</p> <p>SEE ALSO: Delinquent Taxpayer Records: Advertisement of Tax Liens Against Real Property, below.</p>	Destroy in office after 10 years or 3 years after final settlement or 1 year after released by governing board, whichever comes first.*	
21.05	<p>DELINQUENT TAXPAYER RECORDS: ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY Records concerning the municipal taxation officer's publication in the newspaper of delinquent taxpayer and tax sales notices.</p> <p>SEE ALSO: Delinquent Taxpayer Records, above.</p>	Destroy in office after 10 years.*	Authority: G.S. 105-369
21.06	<p>MOTOR VEHICLE RENTAL TAX RECORDS Records concerning motor vehicle rental tax assessments.</p>	Destroy in office after 3 years.*	
21.07	<p>MUNICIPAL VEHICLE TAX RECORDS Records concerning municipal vehicle taxes levied annually.</p>	Destroy in office after 3 years.*	Authority: G.S. 20-97(b)
21.08	<p>PREPARED FOOD AND BEVERAGE TAX RECORDS Records concerning prepared food and beverage tax assessments.</p>	Destroy in office after 3 years.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.09	<p>PRIVILEGE LICENSES, TAXES, AND FEE RECORDS Records concerning the licensing of occupations, businesses, trades, professions, and forms of amusement or entertainment and associated fees and taxes.</p> <p>SEE ALSO: Animal Licensing Records (above), Beer and Wine Taxes and Records (above), Municipal Vehicle Tax Records (above), Taxicab and Limousine Tax Records (below).</p>	Destroy in office after 3 years.*	Authority: G.S. 160A-194
21.10	<p>ROOM OCCUPANCY TAX RECORDS Records concerning the administration of room occupancy tax records for those municipalities who have adopted room occupancy taxes.</p> 	Destroy in office after 3 years.*	Authority: G.S. 160A-215 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.11 	SCHEDULE "B" LICENSES Receipts of licenses issued by municipality in accordance with Article 2, Schedule B of the Revenue Laws of North Carolina. Applies to privilege licenses issued to attorneys-at-law and other professionals, installment paper dealers, and pawnbrokers.	a) Destroy in office 3 years after close of license tax year stubs or detailed settlement records. b) Destroy in office stubs 1 years after audit if settlement records are kept.	Authority: G.S. 105-41 G.S. 105-83 G.S. 105-88 G.S. 153A-152 G.S. 160A-211 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.12	TAX ABSTRACTS AND LISTS Records concerning real and personal property in the municipality, based on assessment lists. Includes name and address of taxpayer along with descriptions of property owned and estimated value.	Destroy in office after 10 years or two revaluation cycles.	Authority: G.S. 105-309 G.S. 105-296
21.13	TAX EXEMPT PROPERTY FILE Records concerning property that is exempt from taxation.	Destroy in office 5 years after property exemption has expired or at end of life of structure, whichever comes first.	
21.14	TAX LEDGER CARDS OR SHEETS	Destroy in office 5 years after superseded or obsolete.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.15	TAX LEVY/SEIZURE RECORDS Inventory of property taken from property owner by the municipal tax collector to pay back taxes.	a) Destroy in office after 3 years execution forms if levy and sale of personal property is made. If levy and sale are conducted by municipal law enforcement agency, execution forms are to be retained by that agency. b) If levy, seizure, and sale are not made, destroy in office forms when reference value ends.± Agency Policy: Destroy in office after <u>30 days</u>	Authority: G.S. 105-366 G.S. 105-367
21.16	TAX LIEN SALES Records concerning sales held to satisfy tax liens.	Destroy in office 10 years after sale.	
21.17	TAX REBATES Records concerning tax rebates given or received.	Destroy in office after 10 years.	
21.18	TAX SCROLLS Records indicating property (real estate and personal) valuation and taxes due.	Destroy in office after 10 years.	
21.19	TAXICAB AND LIMOUSINE TAX RECORDS Records concerning the levy of privilege taxes on taxicabs and limousines.	Destroy in office after 3 years.*	Authority: G.S. 20-97(d)

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MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.
-

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.
-

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.
-

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.
-

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-17) can be used for such requests.
-

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
“Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or

characteristics, made or received pursuant to law or ordinance in connection with the transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (state or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the state or of any county, unit, special district or other political subdivision of government.

Q. Is any person allowed to see my records?

- A. Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at reasonable times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. What about my confidential records?

- A. Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.
-

Q. Am I required to make available to the public copies of drafts that have not been approved?

- A. Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.
-

Q. What do I do with permanent records?

- A. Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**” (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.

- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.
- Adoptions, marriages, and divorces document changes in familial relationships and document citizenship. Though adoptions are confidential (not available for public inspection), they document citizenship and changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its citizens. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of citizens?
- Do they have a long-term impact on citizens?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency’s policies or initiatives?
- Do they summarize an agency’s activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on Page A-21. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See also GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance, STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS, Audits: Financial, STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the General Records Schedule for Local Government Agencies, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the General Records Schedule for Local Government Agencies or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g. a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/digital-signature-policy>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.
-

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a [Request for Disposal for Unscheduled Records](#) form if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. *Am I required to tell anyone about the destructions?*

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

A. E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

A. We do not recommend printing e-mail for preservation purposes. Important metadata are lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

A. The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years. On the General Records Schedule: Local Government Agencies, see Leave Records (Standard 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:
- Parcel data
 - Street centerline data
 - Corporate limits data
 - Extraterritorial jurisdiction data
 - Zoning data, address points
 - Orthophotography (imagery)
 - Utilities
 - Emergency/E-911 themes

For more information, see **GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS.**

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

You should also comply with guidelines and standards issued by the State Archives of North Carolina, which are available on its website.

Q. Who should be responsible for creation and long-term storage of archived data?

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

- A.** We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:
- Managing public records in North Carolina
 - Disaster preparedness and recovery
 - Digital communications

Q. Will you design a workshop especially for our office?

- A.** Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

- A.** No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public.

To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

- A.** Not at this time.

Q. Are the workshops available in an online format?

- A.** We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

Add a new item

Delete an existing item

Standard Number _____ Page _____ Item Number _____

Change a retention period

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

In accordance with the provisions of N.C. GEN. STAT. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature Title Date

Approved by:

Signature Requestor's Supervisor Date

Concurred by:

Signature Assistant Records Administrator State Archives of North Carolina Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:		Date (MM-DD-YYYY):
Phone (area code):	E-mail:	
County/Municipality:	Office:	
Mailing address:		

Records Series Title A group of records as listed in records retention schedule	Description of Records Specific records as referred to in-office	Inclusive Dates (1987-1989; 2005-present)	Approx. Volume of Records (e.g. "1 file cabinet," "5 boxes")	Retention Period As listed in records retention schedule

Requested by: _____

Signature Title Date

Approved by: _____

Signature Requestor's Supervisor Date

Concurred by: _____

Signature Assistant Records Administrator
State Archives of North Carolina Date

INDEX

- 911 COMMUNICATION RECORDS AND RECORDINGS, 12
- ADMISSION RECORDS, 16
- AFFIRMATIVE ACTION FILE (AIRPORT), 1
- AIR POLLUTION SOURCE INFORMATION, 5
- AIR SPACE CONSTRUCTION FILES, 1
- AIRFIELD INSPECTION FILES, 1
- AIRPORT ACCESS CONTROL RECORDS, 1
- AIRPORT MASTER RECORD FILES, 1
- ALARM CALL REPORTS, 53
- ALTERNATIVE SENTENCING PROGRAMS, 53
- AMBULANCE CALL REPORTS, 12
- AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS, 31
- AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS, 31
- AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS, 31
- ANIMAL ABUSE AND CRUELTY RECORDS, 3
- ANIMAL COMPLAINT RECORDS, 3
- ANIMAL CONTROL RECORDS, 3
- ANIMAL LICENSING RECORDS (ANIMAL SERVICES), 4
- ANIMAL LICENSING RECORDS (TAX), 73
- ANIMAL SHELTER RECORDS, 4
- APPRAISAL PROJECT FILE (PUBLIC HOUSING), 25
- APPRAISAL REPORTS (STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING), 46
- ARREST PROCESSING TRACKING RECORDS, 53
- ARREST REPORTS, 54
- ART-IN-TRANSIT APPLICATIONS, 32
- AUCTION RECORDS, 54
- AUDIO AND VIDEO RECORDINGS (LAW ENFORCEMENT), 67
- BEER AND WINE TAXES AND RECORDS, 73
- BICYCLE LICENSE PLATE RECORDS, 73
- BLUEPRINTS AND SPECIFICATIONS, 5
- BOARD OF ADJUSTMENT CASE FILE, 19
- BUILDING AND FIRE SAFETY SYSTEM PLANS, 13
- BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS, 6
- CASE FILE - FELONIES, 54
- CASE FILE - MISDEMEANORS, 55
- CEMETERY DEEDS, 46
- CEMETERY INTERMENT RECORDS, 46
- CERTIFICATES OF APPROPRIATENESS, 20
- CERTIFICATION FILE. *See* Redevelopment Plans
- CHEMICAL ANALYSIS RECORDS. *See* DRUG AND ALCOHOL TESTING RECORDS
- CITATIONS RECORDS, 16
- COMMUNICATION RECORDS (LAW ENFORCEMENT), 55
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS, 26
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES, 26
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY, 26
- COMPLAINTS (LAW ENFORCEMENT), 56
- COMPOSITE INTERVIEWS, 56
- COMPREHENSIVE PLAN AND AMENDMENTS, 20
- COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN & AMENDMENTS, 34
- CONTINUUM OF CARE RECORDS, 27
- CONTROLLED SUBSTANCE EUTHANASIA LOG (ANIMAL SERVICES), 4
- CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS, 6
- CRIME ANALYSIS RECORDS, 56
- CRIMINAL RECORDS CHECKS, 27
- CUSTOMER (RIDER) IDENTIFICATION RECORDS, 32
- CUSTOMER USAGE RECORDS, 34
- DAILY DISPOSAL TICKETS (LANDFILL), 34
- DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, AND COMMON AREAS, 21
- DELINQUENT TAXPAYER RECORDS, 74
- DELINQUENT TAXPAYER RECORDS - ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY, 74
- DESTRUCTIONS LOG, A-10
- DETENTION FACILITY INCIDENT REPORTS, 57
- DETENTION FACILITY OPERATIONAL RECORDS, 57
- DETENTION FACILITY PHYSICAL FORCE RECORDS, 57
- DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS, 32
- DISCHARGE MONITORING REPORTS, 35
- DISCOUNT PASSES APPLICATIONS, 32
- DISPATCH RECORDS AND RECORDINGS (EMS AND FIRE DEPARTMENT), 13
- DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES, 58
- DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS, 58
- DNA SAMPLING RECORDS, 58
- DOMESTIC VIOLENCE RECORDS, 59
- DROUGHT CONTINGENCY PLANS, 6
- DRUG AND ALCOHOL TESTING RECORDS, 59

ELECTRIC POWER AND NATURAL GAS FACILITY
 ENGINEERING & SYSTEM PLANS, 39
 ELECTRIC POWER AND NATURAL GAS PERMITS AND
 APPROVAL RECORDS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM
 MAINTENANCE & REPAIR RECORDS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM
 MANAGEMENT PLANS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT
 RECORDS, 40
 ELECTRONIC RECORDINGS OF INTERROGATIONS, 60
 EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS, 28
 ENVIRONMENTAL IMPACT STUDIES, 21
 EROSION AND SEDIMENT AFFIDAVITS, 36
 EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES,
 6
 EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS, 37
 EROSION AND SEDIMENT CONTROL INSPECTIONS, 37
 EROSION AND SEDIMENT CONTROL PERMITS, 37
 EROSION AND SEDIMENT CONTROL PLANS, 7, 37
 EXCAVATION PERMITS, 47
 EXEMPTIONS (VARIANCE) RECORDS, 7
 FAÇADE PROJECT FILES, 28
 FIELD OBSERVATIONS, 60
 FILE PLAN, 22
 FINGERPRINT CARDS, 61
 FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE, 13
 FIRE DISPATCH FILE, 13
 FIRE INVESTIGATION CASE FILES, 14
 FIRE SAFETY INSPECTIONS AND PERMITS, 14
 FLOOD CERTIFICATIONS, 38
 FLOOD STUDIES, 38
 FORCIBLE ENTRY RECORDS, 61
 FUGITIVE WARRANTS CASE RECORDS, 61
 GOING OUT OF BUSINESS LICENSES, 7
 GRAVE OPENING ORDERS, 47
 GROUNDWATER MONITORING RECORDS, 7
 HISTORIES OF PET OWNERS, 4
 HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS,
 29
 HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES,
 29
 HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS
 (HOPWA) RECORDS, 30
 IDENTIFICATION PHOTOGRAPHS, 62
 ILLEGAL DUMPING FILE, 7
 INCIDENT RESPONSE REPORTS, 62
 INFRASTRUCTURE MAINTENANCE RECORDS, 47
 INMATE CLASSIFICATION RECORDS, 62
 INMATE COMMITMENT RECORDS, 63
 INMATE DEATH REPORTS, 63
 INMATE FINANCIAL RECORDS, 63
 INMATE GRIEVANCE RECORDS, 64
 INMATE MAIL, TELEPHONE, OR VISITOR RECORDS, 64
 INMATE MEAL RECORDS, 64
 INMATE MEDICAL RECORDS, 65
 INMATE PERSONAL IDENTIFICATION RECORDS, 65
 INMATE RESEARCH REQUESTS, 66
 INSPECTIONS, 7
 JUVENILE CASE HISTORY FILES, 66
 JUVENILE CASE HISTORY IDENTIFICATION RECORDS, 66
 JUVENILE DETENTION RECORDS, 66
 LABORATORY CASE RECORDS, 67
 LABORATORY OPERATIONS RECORDS, 44
 LAND DEVELOPMENT AND PLANNING STUDIES AND
 REPORTS (AIRPORT), 2
 LAND MARKETING AND DEVELOPMENT RECORDS. *See*
 HOME Investment Partnerships Program Records
 LANDFILL MONITORING REPORTS, 35
 LANDFILL OPERATIONAL PLAN, 35
 LANDFILL PERMITS, 36
 LANDFILL TONNAGE AND COST FILE, 8
 LANDLORD AGREEMENTS (UTILITIES), 40
 LANDLORD MONITORING RECORDS, 30
 LEAD AND COPPER COMPLIANCE RECORDS, 8
 MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS), 40
 METER TESTING AND CALIBRATION RECORDS (ELECTRIC,
 WATER, GAS), 41
 MOTOR VEHICLE RENTAL TAX RECORDS, 74
 MULTIPLE FIREARMS SALES REPORTS, 67
 MULTIPLE FIREARMS SALES REPORTS DESTRUCTION
 RECORDS, 67
 MUNICIPAL VEHICLE TAX RECORDS, 74
 NORTH CAROLINA FIRE INCIDENT REPORT, 14
 NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR
 DISPOSAL FILE, 36
 OFFICIALS FILE, 16
 OPEN SPACE CLASSIFICATION CASE FILE, 21
 OPERATOR SHIFT INSPECTION RECORDS, 32
 ORDINANCE VIOLATIONS CITATIONS, 68
 OUTSIDE WASTE CLEARANCE RECORDS, 36
 PARKS PLANNING FILE, 17
 PATIENT CARE REPORTS, 12
 PAWNSHOP RECORDS, 68
 PERMISSION TO SEARCH RECORDS, 68
 PERMITS
 CONSTRUCTION, 8
 HANDGUN, 69
 PUBLIC UTILITIES PROJECTS, 8
 TEMPORARY MANUFACTURED HOME, 22
 ZONING COMPLIANCE, 22
 PETITION & REGULATION RECORDS, 22
 PHARMACEUTICAL AND NARCOTICS RECORDS, 15

PLANNING FILE (STREET MAINTENANCE, PUBLIC WORKS,
 AND ENGINEERING), 47
 PLANNING REVIEW CASE FILE, 23
 POOL RECORDS, 17
 PREPARED FOOD AND BEVERAGE TAX RECORDS, 74
 PRETREATMENT PROGRAM RECORDS, 44
 PRISON RAPE ELIMINATION ACT (PREA) DATA FILE, 69
 PRISON RAPE ELIMINATION ACT (PREA) FILE, 69
 PRISONER AND MENTAL PATIENT TRANSPORT RECORD, 69
 PRIVILEGE LICENSES, TAXES, AND FEE RECORDS, 75
 PROJECT RECORDS – CANCELLED (PUBLIC WORKS AND
 ENGINEERING), 47
 PROJECT RECORDS – CORE (PUBLIC WORKS AND
 ENGINEERING), 48
 PROJECT RECORDS – ENGINEERING & COMPLIANCE, 49
 PROJECT SHEETS FILE (STREET MAINTENANCE, PUBLIC
 WORKS, AND ENGINEERING RECORDS), 50
 PROPERTY MANAGEMENT RECORDS. *See* HOME
 Investment Partnerships Program Records
 PROPERTY RECORDS - STOLEN AND RECOVERED, 70
 PUBLIC UTILITIES INSPECTION FORMS, 41
 PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE,
 AND REPAIR, RECORDS, 42
 PUBLIC WATER SANITARY SURVEY RECORDS, 44
 PURSUIT LOGS, 70
 RABIES VACCINATION RECORDS, 4
 RADIO LOGS (AIRPORT), 2
 RECREATION PROGRAMS, 17
 RECREATIONAL VEHICLE REGISTRATION RECORDS, 9
 RECYCLING WATER RECORDS, 42
 REDEVELOPMENT PLANS (PUBLIC HOUSING AND
 REDEVELOPMENT COMMISSION RECORDS), 30
 REHABILITATION RECORDS. *See* HOME Investment
 Partnerships Program Records
 RELOCATION RECORDS. *See* HOME Investment
 Partnerships Program Records
 REPORTS
 DAILY WATER AND WASTEWATER FACILITY OPERATORS
 LOGS, 38
 ENVIRONMENTAL PROTECTION AGENCY (EPA), 36
 WASTEWATER MAINTENANCE OPERATIONS, 43
 REQUEST FOR CHANGE IN LOCAL GOVERNMENT RECORDS
 SCHEDULE, A-19
 REQUEST FOR DISPOSAL OF ORIGINAL RECORDS
 DUPLICATED BY ELECTRONIC MEANS, A-21
 REQUEST FOR DISPOSAL OF UNSCHEDULED RECORDS,
 A-20
 REZONING RECORDS AND INDEXES, 23
 RIDE-ALONG PROGRAM RECORDS, 70
 RIGHT-OF-WAY ACQUISITION WORKING RECORDS, 50
 ROOM OCCUPANCY TAX RECORDS, 75
 ROUTE HISTORY RECORDS, 33
 SCHEDULE "B" LICENSES, 76
 SEAT BELT AND RESTRAINT SYSTEM RECORDS, 33
 SERVICE INTERRUPTION RECORDS, 42
 SEWER JETTING AND VECTORING RECORDS, 45
 SEXUAL OFFENDER RECORDS, 70
 SLUDGE TREATMENT RECORDS, 45
 SOCIAL MEDIA, A-12
 SPECIAL USE PERMIT RECORDS AND INDEX, 21
 STORMWATER DEVIATION PERMITS, 45
 STREET NAME AND HOUSE NUMBER FILES, 50
 STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS, 51
 SUBDIVISION RECORDS, 24
 SURVEY FIELD RECORDS, 51
 TAP AND HOOK UP RECORDS, 43
 TAX ABSTRACTS AND LISTS, 76
 TAX EXEMPT PROPERTY FILE, 76
 TAX LEDGER CARDS OR SHEETS, 76
 TAX LEVY AND SEIZURE RECORDS, 77
 TAX LIEN SALES, 77
 TAX REBATES, 77
 TAX SCROLLS, 77
 TAXICAB AND LIMOUSINE TAX RECORDS, 77
 TEXT MESSAGES, A-12
 TICKET STUBS, 18
 TRAFFIC ACCIDENT REPORTS, 71
 TRAFFIC ANALYSIS, 51
 TRAFFIC CITATIONS, 71
 TRAFFIC VIDEO RECORDINGS AND DATA, 52
 TRAFFIC WARNINGS, 71
 TRANSIT SCHEDULES, 33
 TRANSIT SERVICE APPLICATIONS, 32
 TRESPASS RECORDS, 72
 TROUT BUFFER VARIANCES, 38
 UNSAFE BUILDINGS FILE, 9
 VALVE OPERATION FILE, 9
 VANPOOL DRIVER APPLICATIONS, 33
 VARIANCES (PLANNING AND REGULATION OF
 DEVELOPMENT), 24
 VEHICLE TOWING RECORDS, 72
 VIOLATIONS
 BUILDING AND HOUSING, 9
 SOLID WASTE MANAGEMENT, 10
 WATER CONSERVATION, 10
 ZONING, 24
 WASTEWATER POLLUTION CONTROL AND ABATEMENT
 RECORDS, 10
 WASTEWATER QUALITY ANALYSIS RECORDS, 10
 WATER & WASTEWATER PERMITS & APPROVAL RECORDS,
 43
 WATER & WASTEWATER SYSTEM INSPECTIONS & TESTS,
 45
 WATER ANALYSIS, 11
 WATER QUALITY VIOLATION RECORDS, 45

WATER SYSTEM OPERATIONS RECORDS, 11

WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS
FILE, 11

Town of Archer Lodge

14094 Buffalo Road
Archer Lodge, NC 27527
Main: 919-359-9727 Fax: 919-359-3333
Website: <https://www.archerlodgenc.gov>



Application for Appointment

(Please Print when completing the application)

Email: jenny.martin@archerlodgenc.gov
joyce.lawhorn@archerlodgenc.gov

RECEIVED

NOTE: Applicants shall reside in the Archer Lodge Town Limits.

AUG 01 2024

Please indicate below which board you are interested in serving on:

TOWN OF ARCHER LODGE

BY: _____

[Signature]

Planning Board & Board of Adjustments

Other _____

1st Time Appointment

Reappointment

Full Name Christopher James Deaderick

Address 188 Darcy Drive, Archer Lodge NC 27527

Mobile Phone# 201-344-2765 Landline Phone# 919-672-0134

Email Address Chris.deaderick@HOME.com Work Phone# 919-672-0134

Education Background BA in English and Communications - Saint Peters University

Employer HOME, Inc Occupation Operations Manager

Do you live in the Archer Lodge Corporate Limits? Yes How long? 5.5 years

Are you a citizen of the United States? Yes How Long? Born in U.S.A. - 45 years

Have you ever served on the Board listed above? No If yes, when _____

What do you feel are your qualifications for serving on the board and why do you think you would be an asset to this board?

I have successfully managed the day to day operations for multiple multi-million dollar businesses for 20 years. I manage budgets, material, field labor, etc. in a construction/major projects field, as well as, the service side of the Elevator industry. I am familiar with General Contracting from start to finish. I hold a real estate license and am knowledgeable on laws, codes, and ethics. I hold a NC Limited Electrical License.

Signature *[Signature]* Date 8/1/24

I acknowledge receiving, reading & agree to the Archer Lodge Code of Ordinances attached to this application.

Any comments can be written on the back of this page if you need additional space.

Appointed to _____ on _____

I have managed large groups of union labor for most of my career and am exceptional at dealing with many different individuals with many different personalities.

My family and I moved to Archer Lodge over 5 years ago and absolutely love it here. We knew from the first minute that this is home. We have been warmly welcomed by everyone and hope to continue to grow and be a part of the community for years to come. We moved here because of its beauty and small town appeal. I have lived in areas that experienced large population growths in short periods of time, and I have seen the positive and negative effects of that growth. I need to know that I am doing all that I can to insure that the growth of Archer Lodge remains positive. I know that I can be an enormous asset to the community by using my knowledge, ~~and~~ people, and problem solving skills - All with the greater good in mind. You cannot stop progress, but, you can stay in front of it and control it so that Archer Lodge remains a beautiful community with a small town appeal.

Town of Archer Lodge

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Website: <https://www.archerlodgenc.gov>



Application for Appointment

(Please Print when completing the application)

Email: ben.king@archerlodgenc.gov
jenny.martin@archerlodgenc.gov

NOTE: Applicants shall reside in the Archer Lodge Town Limits.

Please indicate below which board you are interested in serving on:

Governing Body/Town Council

Planning Board & Board of Adjustments

1st Time Appointment

Reappointment

Full Name Melissa Skinner McCormick

Address 209 Wyndfall Lane Archer Lodge, NC 27527

~~MOBILE PHONE#~~ (919) 771-4611 Landline Phone# N/A

Email Address MCCormick42917@gmail.com Work Phone# N/A

Education Background Bachelors of Science - Recreational therapy

Employer N/A Occupation Full time mother 😊

Do you live in the Archer Lodge Corporate Limits? YES How long? 5 yrs @ this address total = 25 yrs

Are you a citizen of the United States? YES How Long? _____

Have you ever served on the Board listed above? NO If yes, when _____

What do you feel are your qualifications for serving on the board and why do you think you would be an asset to this

~~BOARD?~~

Growing up in AL to living here as an adult, I have developed a huge heart for our community. I understand the unique needs, challenges and opportunities. I value respectful dialogue and diverse perspectives. I enjoy reviewing data, maps and information to evaluate. I am a team player and feel I could be a valuable asset to the planning board.

Melissa S McCormick 6/26/25

~~Signature~~ ~~Date~~

~~I acknowledge receiving, reading & agree to the Archer Lodge Code of Ordinances attached to this application.~~

Any comments can be written on the back of this page if you need additional space.

Appointed to _____ on _____

Town of Archer Lodge

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Application for Appointment

Please print and submit the application at Town

Hall or email to staff at the address below:

ben.king@archerlodgenc.gov

NOTE: Applicants shall reside in the Archer Lodge Town Limits.

Please indicate below which board you are interested in serving on:

Governing Body/Town Council

Planning Board & Board of Adjustments

1st Time Appointment

Reappointment

Full Name Russ Austin

Address 136 Amsterdam Drive, Archer Lodge, NC 27527

Mobile Phone# (919)427-5634

Landline Phone# None

Email Address wolfpack1984@gmail.com

Work Phone# (919)745-0379

Education Background BA Degree in Political Science/Criminal Justice

Employer Highwoods Properties

Occupation Maintenance Engineer

Do you live in the Archer Lodge Corporate Limits? Yes

How long? 25 Years

Are you a citizen of the United States? Yes

How Long? Lifetime

Have you ever served on the Board checked above? No If yes, when _____

What do you feel are your qualifications for serving and why do you think you would be an asset?

Please see attached statement.

Signature

Date 7/24/2025

I acknowledge receiving, reading & agree to the Archer Lodge Code of Ordinances attached to this application.

Any comments can be written on the back of this page if you need additional space.

Appointed to _____ on _____

Dear Members of the Town Planning Board,

I am writing to express my sincere interest in serving on the Archer Lodge Town Planning Board. As a long-time resident of our community for over 25 years, I have a deep appreciation for the values, challenges, and opportunities that shape the future of Archer Lodge.

Following my 30-year career with the Raleigh Police Department, now retired, I bring with me a strong background in public service, a commitment to fairness, and a grounded understanding of how thoughtful planning can support both safety and sustainable growth. My experiences have strengthened my ability to listen, communicate clearly, remain open-minded, and work collaboratively to reach balanced decisions.

I am deeply engaged in our town and am committed to ensuring that our planning efforts reflect the needs and voices of our residents. I pride myself on being a strong listener and communicator, and I approach every discussion with fairness and a willingness to learn. As our town continues to grow, I believe in the importance of planning that preserves our community's character while also embracing smart, forward-thinking development.

I would be honored to contribute my experience, perspective, and passion for service to the Planning Board and to help guide decisions that will positively impact the future of Archer Lodge.

Thank you for your time and consideration. I welcome the opportunity to further discuss how I can be an asset to the board.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul Hester". The signature is fluid and cursive, with a long horizontal stroke at the end.

Town of Archer Lodge

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Application for Appointment

Please print and submit the application at Town Hall or email to staff at the address below:
ben.king@archerlodgenc.gov

NOTE: Applicants shall reside in the Archer Lodge Town Limits.

Please indicate below which board you are interested in serving on:

Governing Body/Town Council

Planning Board & Board of Adjustments

1st Time Appointment

Reappointment

Full Name Joe G. Creech, Jr.

Address 505 Wendell Road, Wendell, NC 27591

Mobile Phone# 919 600-1053

Landline Phone# _____

Email Address jgcsr505@yahoo.com

Work Phone# _____

Education Background BS Recreation Resources Administration NCSU 1986

Employer NCDOT

Occupation Retired

Do you live in the Archer Lodge Corporate Limits? Yes How long? 26 Years

Are you a citizen of the United States? Yes How Long? 63 Years

Have you ever served on the Board checked above? No If yes, when _____

What do you feel are your qualifications for serving and why do you think you would be an asset?

See Attached

Signature

Joe G Creech Jr

Date 7-26-2025

I acknowledge receiving, reading & agree to the Archer Lodge Code of Ordinances attached to this application.

Any comments can be written on the back of this page if you need additional space.

Appointed to _____ on _____

I retired in 2021 after working in state government for thirty-five years in the Departments of Transportation and Administration. The bulk of my experience was in DOT's Right-of-Way Branch in the Property Management area. I reviewed work from all fourteen state divisions for various contracts (grass mowing, rodent control, asbestos inspections, and grave removal). I prepared the Board of Transportation and Council of State Agendas as well as presented Board matters to the Governor and Council of State regarding pertinent state-owned properties. I drafted deeds and easements for conveyance as part of my DOT responsibilities. When I worked at DOA, I was charged with locating office space for state agencies which involved site visits to ensure code compliance. My work experience provides familiarity with the type of work that the Planning Board does.

I grew up in Garner, but spent many weekends and summers with my grandparents, Harlene and Maggie Barnes, here in Archer Lodge. My wife and I live in their house where we have resided for over twenty-six years. We raised our family in this house and have seen many changes over our years here. When I was growing up, this was an agricultural community with a much slower pace of life. Now we are surrounded by subdivisions and retail stores. I often wonder what my grandparents would think about the place that Archer Lodge has become. I am not opposed to growth or progress, but I have concerns about growth without proper planning. I want to serve this community by bringing my years of work experience and my love of the rural way of life to the Planning Board.

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Hall or email to staff at the address below:

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Please indicate below which board you are interested in serving on:

Governing Body/Town Council

Planning Board & Board of Adjustments

_____ **1st Time Appointment**

_____ **Reappointment**

Full Name _____

Address _____

Mobile Phone# _____ Landline Phone# _____

Email Address _____ Work Phone# _____

Education Background _____

Employer _____ Occupation _____

Do you live in the Archer Lodge Corporate Limits? _____ How long? _____

Are you a citizen of the United States? _____ How Long? _____

Have you ever served on the Board checked above? _____ If yes, when _____

What do you feel are your qualifications for serving and why do you think you would be an asset?

Signature Spencer Lane _____ Date _____

I acknowledge receiving, reading & agree to the Archer Lodge Code of Ordinances attached to this application.

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Appointed to _____ on _____