

**Town of Montreat
Board of Commissioners
Town Council Agenda Meeting
September 7, 2017 – 7:00 p.m.
Walkup Building**

I. Call to Order

- Pledge of Allegiance
- Moment of Silence

II. Agenda Adoption

III. Public Hearing: Proposed Rezoning of Eastern Side of Florida Terrace From Industrial/Residential (I/R) to Residential Low Density (R1) Followed by Possible Action

IV. Mayor's Communications

V. Consent Agenda

A. Meeting Minutes Adoption

- August 3, 2017, Town Council Agenda Meeting Minutes
- August 10, 2017, Town Council Public Forum Minutes
- August 10, 2017, Town Council Meeting Minutes

All items on the Consent Agenda are considered routine, to be enacted by one motion with the adoption of the agenda and without discussion. If a member of the governing body requests discussion of an item, it will be removed from the Consent Agenda and considered separately.

VI. Town Administrator's Communications

- Consent Agenda Review
- Other Items

VII. Administrative Reports

- Police Chief
- Public Works Director
- Finance Officer
- Building Inspector/Code Administrator - pending

VIII. Public Comment – Agenda Items

Public comments will be heard during this period for only those items listed on the meeting agenda.

IX. Old Business

X. New Business

A. Montreat as a welcoming community

- **Suggested Motion:** To move to add the phrase "to be a welcoming community" to the Board of Commissioners Mission Statement.

*"To seek ways to be a **welcoming** community, to maintain and improve the quality of life, preserve the natural beauty and promote responsible growth while maintaining our community image, heritage and traditions."*

B. Zoning Official Position Review

I. Public Comment – Other Topics

Public comments will be heard during this period for other public business items or topics not listed on the meeting agenda.

II. Commissioner Communications

III. Meeting Dates

September Town Council Meeting:

September 14, 2017, 7:00 p.m.
Public Forum begins at 6:30 p.m.
Walkup Building

Montreat Tree Board:

September 19, 2017, 9:30 a.m.
Town Services Building

Board of Adjustment:

September 28, 2017, 7:00 p.m.
Walkup Building

Montreat Landcare:

October 4, 2017, 7:00 p.m.
Allen Building
Swannanoa Room

October Town Council Agenda Meeting:

October 5, 2017, 7:00 p.m.
Walkup Building

October Town Council Meeting:

October 12, 2017, 7:00 p.m.
Public Forum begins at 6:30 p.m.
Walkup Building

- IV. Closed Session (09/07/2017): To enter into Closed Session in accordance with NCGS §143-318.11(6) for discussion of a personnel matter**
- V. Closed Session (09/14/2017): To enter into Closed Session in accordance with North Carolina General Statute §143-318.11(5) to discuss the proposed acquisition of real property identified as (PIN # 0710-53-9360), located on Montreat Road, for potential Montreat Town Hall**
- VI. Public Comment**
- VII. Adjournment**

MEMORANDUM

TO: Board of Commission, Town of Montreat

FROM: Emory Underwood, Chair of Planning and Zoning

DATE: July 13, 2017

SUBJECT: Review and Recommendation of Potential Rezoning of Eastern Florida Terrace Properties from (I/R) Institutional/Residential to (R-1) Low-Density Residential for conformity with the Comprehensive Plan and other Developmental Regulations as Necessary

On April 6, 2017, the Montreat Board of Commissioners directed the Planning and Zoning Commission to review a potential rezoning of eastern Florida Terrace properties from (I/R) Institutional/Residential to (R-1) Low-Density Residential for conformity with the Comprehensive Plan and other developmental regulations as necessary. The Planning Zoning Commission met on May 18th, and again on June 1st to consider this review.

At the meeting of May 18th all appointed members of the Commission were present along with three members of Town staff and seven members of the public. Tanner Pickett representing the MRA read a prepared statement from Richard DuBose. In it, he urged the Planning and Zoning Commission to seek zoning alternatives that would preserve the Sylvan Heights property's full status for institutional use. The Commission considered the precedent of rezoning requests in Montreat, the fact that the property had not been yet been placed on the market, residential stakeholders on Florida Terrace, and the process by which the Town Council requested the review. The Planning and Zoning Commission heard additional public comment and recessed until additional information was gathered.

At the June 1st meeting, all members of the Planning and Zoning Commission were present along with three members of Town staff and seven members of the public. The Commission heard public comment. Three people spoke in favor of rezoning Florida Terrace to R-1 Low-Density Residential, one thanked the Commission for all of their hard work, one spoke in favor of an additional zoning designation that would allow residential quadraplexes, and one cautioned that the Commission needed to be thoughtful and methodical when making zoning decisions.

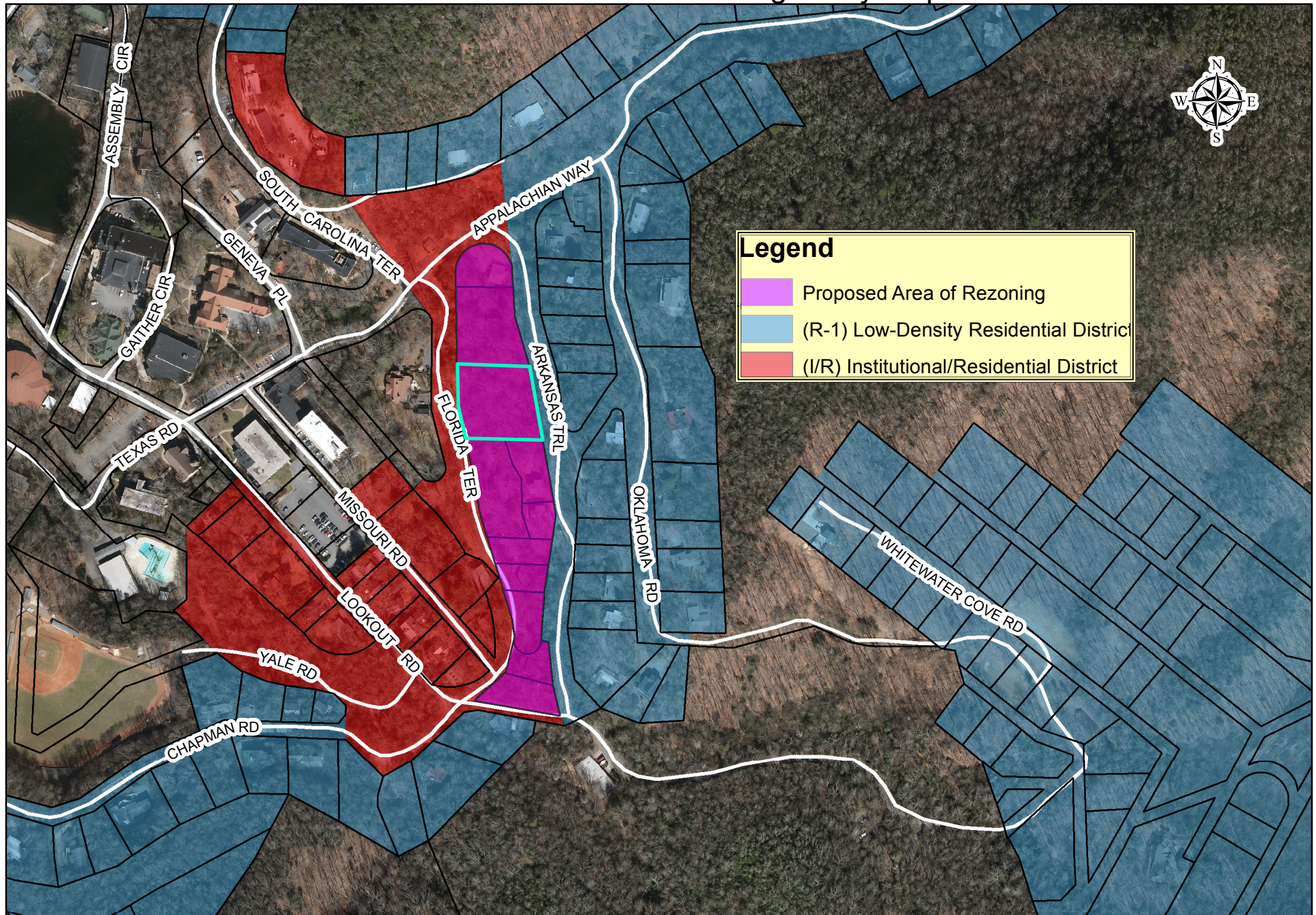
The Commission discussed the public comment, and the additional information provided by staff, the status of the Sylvan Heights property, the time period for public engagement, the need for affordable housing, setting negative precedent, and the proposal's alignment with the Comprehensive Plan. Members of the Commission discussed some goals of the Comprehensive Plans that were in alignment with the proposed rezoning and some goals that were in conflict with the proposed rezoning. The Commission expressed its desire that if the Town did rezone Florida Terrace that it would exclude Sylvan Heights.

Though members of the Commission questioned the wisdom of rezoning Florida Terrace ultimately they found that Comprehensive Plan was broad, if at time contradictory, in its

goals. The Planning and Zoning Commission voted unanimously to recommend that all three of the following options meet the requirements of the Comprehensive Plan:

1. the proposed zoning of Florida Terrace,
2. the proposed rezoning omitting the Sylvan Heights property,
3. and maintaining the existing zoning map without change.

Florida Terrace Lot - Rezoning Study Map



0 145 290 580 870 1,160 Feet

FLORIDA TERRACE REZONING PETITION 3-20-17

PETITION TO: The Town of Montreat

PROPERTY: One city block bound on the West by Florida Terrace and on the East by Arkansas Trail consisting of ten(10) houses(hereafter referred to as Block A).

PETITION REQUEST: That "Block A" be rezoned from Institutional/Residential to Residential.

Supporting this Petition are the following homeowners with addresses on Block A.

Louisa and David Berry
367 Arkansas Trail.
Montreat NC

Nancy and Francis Burris
351 Florida Terrace
360 Arkansas Trail
376 Arkansas Trail

John and Anne Wilson
Florida Terrace

Susan Duncan
372 Arkansas Trail

Jane and Steve Unti
372 Arkansas Trail

Richards Roddey
Gail Roddey
Martha Dunlap Neblett
345 Lookout Road

**Town of Montreat
Planning and Zoning Commission
Meeting Minutes
May 18, 2016 – 7:00 p.m.
Walkup Building**

Board members present: Chairman Emory Underwood
Secretary Kay Layman
Linda Stroupe
Anne Seaman
Judy Shillinglaw

Board members absent: None

Town staff present: David Currie, Code Enforcement Officer/Building Inspector
Angie Murphy, Town Clerk
Alex Carmichael, Town Administrator

Seven members of the public were present. Mr. Underwood called the meeting to order at 7:03 p.m., and led the group in a moment of silence.

Agenda Approval

Mrs. Stroupe moved to adopt the agenda as presented. Mrs. Layman seconded and the motion carried 5/0.

Staff Communications

Mr. Currie stated that it was time for re-election of officers. Mrs. Stroupe moves to elect Mr. Emory Underwood as Chair of Planning & Zoning. Mrs. Shillinglaw seconded and the motion carried 5/0. Mrs. Shillinglaw nominated Mrs. Seaman as Vice-Chair of Planning & Zoning. Mrs. Stroupe seconded and the motion carried 5/0. Mrs. Shillinglaw nominated Mrs. Layman as Secretary of Planning & Zoning. Mrs. Seaman seconded and the motion carried 5/0.

Meeting Minutes Adoption

A. September 28, 2016 Meeting Minutes: Mrs. Seaman moved to adopt the September 28, 2016 Meeting Minutes as amended. Mrs. Stroupe seconded and the motion passed 5/0.

Public Comment

Tanner Pickett of 102 Walker Street in Black Mountain read a prepared statement, which is outlined below, from Richard DuBose of the MRA. "I have been following the issue of Florida Terrace rezoning for some time, and have responded directly to both Kent Otto and Mayor Helms when asked about it. In those conversations, I have expressed the MRA's opposition, but have also

maintained that for the MRA the debate was mostly abstract, as we were discussing one piece of property: the Town's lot on Florida Terrace. That has changed, apparently, with the recent discussion about rezoning the east side of Florida Terrace. I have not seen the map, but understand that the MRA's property, specifically "Sylvan Heights," would be subject to future restrictions as the result of a more widespread action. As I understand it (and I admit that I am still getting up to speed myself on the full implications), under the more comprehensive full rezoning of Florida Terrace now proposed, Sylvan Heights could be grandfathered in and retain its current use. However, since it would now be a non-conforming structure under zoning ordinances, Sylvan and its use would be subject to several unnecessary restrictions, including the fact that Sylvan would be restricted for future development – additions or expansions to the structure would be prohibited. Other restrictions on use and repairs could also become a burden. Once rezoned, it is politically unlikely to imagine Sylvan's rezoning would ever be reversed. These restrictions under the residential rezoning would pose an unnecessary potential burden on the property for the MRA's future use, and pose a cause for concern for those of us who 1) appreciate the MRA's ministry and 2) cannot predict the future. For these reasons, I urge the Board and Commission to seek zoning alternatives that would preserve the Sylvan property's full status for institutional use, as it currently enjoys. Please make every effort to retain its I/R designation, which is serving its purpose as a transitional zone for mixed use. Thank you for the opportunity to deliver this message, and for all your hard work, on our behalf at the MRA, and on behalf of our community."

Old Business

There was no old business to discuss.

New Business

Discussion of Possibly Rezoning the Eastern Side of Florida Terrace: Mrs. Stroupe asked for some background information on why this topic was being brought before Planning & Zoning this evening. Mr. Currie stated that with the potential sale of the Florida Terrace property owned by the Town the possibility of rezoning the entire eastern side of Florida Terrace has been discussed in great detail. The Board of Commissioners thought that rezoning could increase the salability of the property and they have charged the Planning & Zoning Commission with determining whether rezoning is in keeping with the Comprehensive Plan. Mrs. Seaman asked what the test has been in the past for rezoning requests. Mrs. Stroupe asked if there was a history of lots being rezoned in Montreat. Mr. Currie stated that in his nine years with the Town there had not been a request for rezoning. Mrs. Seaman asked if the property on Florida Terrace was on the market and Mr. Currie advised that it was not for sale at this time. Mrs. Seaman asked if they would be giving the Town preferential treatment since the Town owns the property and would they be asked to reconsider the zoning if any other citizen requested it for the same reason. Mr. Underwood asked if any of the residents along Florida Terrace had talked to the Town about amending the rezoning to R1. Town Clerk Angie Murphy advised that there was a petition that had been circulated from residents who owned property on or near Florida Terrace who wished to have the zoning amended. Mrs. Seaman

asked how the Town Council was supposed to pass along these types of requests to their lower level commissions. Mr. Currie advised that the official request came down after a discussion at a Town Council Meeting. Mr. Currie restated that the purpose of the meeting was to look at the potential rezoning of the eastern side of Florida Terrace while omitting Sylvan Heights. Mrs. Stroupe stated that this request would be easier to understand if the property had been for sale for a year or so with no takers then it would make sense to say that the zoning is affecting the salability. Mrs. Stroupe stated that before she can place her vote she needs some history of the zoning map specifically if any other individuals have asked for a lot to be rezoned. Mrs. Stroupe would also like to know if it is one individual that wants the zoning changed or a number of people. Mr. Currie advised the group that they were welcome to postpone their decision until the Town could provide some additional information to assist them in their recommendation. It was decided that the commission would reconvene on June 1st at 4:00 p.m. Mrs. Stroupe moved to recess with the understanding that the commission would reconvene on June 1st to make a decision once additional information has been gathered. Mrs. Layman seconded and the motion carried 5/0.

Public Comment

Mrs. Grace Nichols of 527 Suwanee Drive felt that the suggested motion was very confusing. Mrs. Nichols felt that this was a burden to put on the commission without having all the pertinent information. She mentioned that at the Council meeting it was brought up that they wanted it rezoned R1 to capture the tax benefits. Mrs. Nichols stated that she felt they were narrowing the buying field by limited it to R1 buyers.

Mr Gill Campbell of 149 Maryland Place suggested that the Commission look at more of the Comprehensive Plan to see what was being developed at the time in Montreat. He also stated that they should remember Mr. DuBoses's comments as read by Tanner Pickett about Sylvan Heights.

Adjournment

Mrs. Seaman moved to recess the meeting. Mrs. Layman seconded and the motion carried 5/0. The meeting was recessed at 8:05 p.m.

Emory Underwood, Chair

Angie Murphy, Town Clerk

**Town of Montreat
Planning and Zoning Commission
Meeting Minutes-Recessed Meeting from May 18
June 1, 2016 – 5:00 p.m.
Walkup Building**

Board members present: Chairman Emory Underwood
Secretary Kay Layman
Linda Stroupe
Anne Seaman
Judy Shillinglaw

Board members absent: None

Town staff present: David Currie, Code Enforcement Officer/Building Inspector
Angie Murphy, Town Clerk
Alex Carmichael, Town Administrator

Seven members of the public were present. Mr. Underwood called the meeting to order at 5:00 p.m., and led the group in a moment of silence.

Agenda Approval

Mrs. Stroupe moved to adopt the agenda as presented. Mrs. Layman seconded and the motion carried 5/0.

Staff Communications

Town Administrator Alex Carmichael stated that he was attending the meeting as an additional resource for the commission this evening.

Public Comment

Mr. Bob Toomey of 599 Greybeard Trail expressed his support for changing the zoning designation from Institutional/Residential to R1.

Mrs. Louisa Burriss of 599 Greybeard Trail stated that she was an owner of a rental cottage on Florida Terrace and she just wanted to make sure everyone had a copy of the petition signed by the supporters who are for amending the zoning designation.

Ms. Ginny Porter of 388 Appalachian Way stated that she would like to see the Florida Terrace property owned by the Town of Montreat amended to R1 for the tax money.

Old Business

There was no old business to discuss.

New Business

Discussion of Possibly Rezoning the Eastern Side of Florida Terrace: Mrs. Seaman questioned where the suggested motion derived from and Mr. Carmichael stated that it came from the motion that was adopted by the Council. Mrs. Seaman asked if a member of Council was going to be present for this meeting and Mr. Carmichael stated that there would not be anyone representing the Board. Mrs. Stroupe felt that in the future she would like Council to provide more information regarding a recommendation as the Commission felt kind of in the dark during the first of these two meetings. She stated that this Commission was never going to just “rubber-stamp” items sent down from Council. Mrs. Layman stated that it was helpful in hearing from the public today to understand the rationale behind the request for amending the zoning. Mrs. Shillinglaw stated that the minutes from the Council meeting were extremely helpful. She also wanted to make sure that the public had adequate time to discuss this before any decisions are ultimately made because that has caused problems for Montreat in the past. Mrs. Seaman questioned the actual problem that the Commission is trying to solve because she still does not see an issue. Mrs. Stroupe felt that this decision could pose a risky precedent for the Town. She went on further to say that by having a small group of people come forward to weigh-in on a large matter could cause a lot of long term problems. Mrs. Stroupe had concerns that the Commission might be hindering the MRA and Montreat College in long term development issues. Mrs. Stroupe was a member of the long range planning committee several years back and one concept that kept coming up was affordable housing for retired church professionals. She feels that we are running short on Institutional lots while residential lots are plentiful. Mr. Carmichael felt that the conversations of the Council never included the salability of the property but rather the tax values and the petition started by the citizens. Mr. Carmichael stated that the Commission’s charge is to decide if the property being rezoned to R1 aligns with the Comprehensive Plan. Mrs. Seaman questioned why Planning & Zoning was even involved if the rezoning is a done deal. Mrs. Stroupe questioned whether the Commission could even put a time limit on the potential rezoning to give the public time to weigh in. Mr. Carmichael advised that after answering the question if it is in align with the Comprehensive Plan the Commission should feel free to give their own recommendation to Council. Mrs. Stroupe stated that she feels the rezoning is aligned with some of the long range plan but not all of it. Mrs. Layman stated that no matter what the recommendation is can the Commission agree that Sylvan Heights is excluded. Mr. Underwood moved to state that the proposed zoning meets the requirements of the Comprehensive Plan, the property rezoning omitting Sylvan Heights also matches the Comprehensive Plan and doing nothing at all meets the Comprehensive Plan. These are the three items the Council can act upon. The motion passed with a unanimous vote 5/0. Mr. Carmichael stated there was great value in the Planning & Zoning Commission.

Public Comment

Mrs. Martha Campbell of 149 Maryland Place thanked the Commission for all of their hard work.

Mrs. Louisa Burriss of 599 Greybeard Trail questioned if there was a zoning designation that would allow for duplexes or quadplexes but would not allow for institutional. Mrs. Burriss stated that if there was an additional zoning designation that would allow strictly residential they would not be opposed to the idea of affordable housing. Institutional zoning might allow for another “clash” down the road.

Mr. Gill Campbell of 149 Maryland Place stated that we needed to be thoughtful and methodical when making decisions.

Adjournment

Mrs. Seaman moved to adjourn the meeting. Mrs. Layman seconded and the motion carried 5/0. The meeting was recessed at 5:56 p.m.

Emory Underwood, Chair

Angie Murphy, Town Clerk

Montreat Zoning Ordinances Article XIII: Amendments

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1303 Public Hearing by the Board of Commissioners.

A. Amendment to the Zoning Ordinance. Before enacting an amendment to the Ordinance, the Board of Commissioners shall hold a public hearing. Public hearings shall be held during the regularly scheduled meeting of the Board of Commissioners.

1) At least ten (10) days notice of time and place of the hearing shall be published in a newspaper of general circulation in Montreat for two (2) consecutive weeks.

2) At the public hearing, the Board of Commissioners may adopt the proposed amendment, reject the proposed amendment, refer the proposed amendment back to the Planning and Zoning Commission for further consideration or hearing, or modify the proposed amendment and adopt it as modified.

3) In the case of a protest against a proposed amendment, signed by the owners of at least twenty percent (20%) either (1) of the area of lots affected by such proposed amendment, or (2) of those immediately adjacent thereto, either in the rear thereof or on either side thereof, extending one hundred feet (100') therefrom, or (3) of those directly opposite thereto, extending one hundred feet (100') from the street frontage of such opposite lots, then such amendment shall not become effective except by favorable vote of three-fourths of all members of the Board of Commissioners.

B. Changes in the Official Zoning Map. Before enacting a change to the Official Zoning Map, the Board of Commissioners shall hold a public hearing. Public hearings shall be held during the regularly scheduled meeting of the Board of Commissioners.

1) If the proposed change to the Official Zoning Map affects fewer than fifty (50) different properties, the owners (as shown on county tax listing) of the parcel(s) of land affected by the proposed change in the zoning map and the owners (as shown on the county tax listings) of all parcels of land abutting that parcel of land shall be mailed a notice of a public hearing on the proposed change by first class mail at the last addresses listed for such owners on the county tax abstracts. This notice must be deposited in the mail at least ten (10) but not more than twenty-five (25) days prior to the date of the public hearing. The person(s) mailing such notices shall certify to the Board of Commissioners that the notices were mailed in accordance with this section, and such certificate shall be deemed conclusive in the absence of fraud.

Montreat Zoning Ordinances Article XIII: Amendments

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2) If the proposed change to the Official Zoning Map affects at least fifty (50) different properties, then the Town may elect to mail notices as provided above or may, as an alternative, elect to publish once a week for four successive weeks in a newspaper having general circulation in Montreat an advertisement of the public hearing that shows the boundaries of the area affected by the proposed change to the Official Zoning Map and explains the nature of the proposed change. The final two advertisements shall comply with and be deemed to

satisfy the provisions of N.C.G.S. §160A-364. The advertisement shall not be less than one-half of a newspaper page in size. The advertisement shall only be effective for property owners who reside in the area of general circulation of the newspaper which publishes the notice. Property owners who reside outside the newspaper circulation area, according to the address listed on the most recent property tax listing for the affected property, shall be notified by first class mail pursuant to this ordinance. The person(s) mailing such notices shall certify to the Board of Commissioners that the notices were mailed in accordance with this section, and such certificate shall be deemed conclusive in the absence of fraud. In addition to the published notice, the Town shall post one or more prominent signs on or immediately adjacent to the subject area reasonably calculated to give public notice of the proposed change in the Official Zoning Map.

3) At the public hearing, the Board of Commissioners may adopt the proposed change, reject the proposed change, refer the proposed change back to the Planning and Zoning Commission for further consideration or hearing, or modify the proposed change and adopt it as modified.

4) In the case of a protest against a proposed change signed by the owners of at least twenty percent (20%) either (1) of the area of lots affected by such proposed change, or (2) of those immediately adjacent thereto, either in the rear thereof or on either side thereof, extending one hundred feet (100') therefrom, or (3) of those directly opposite thereto, extending one hundred feet (100') from the street frontage of such opposite lots, then such amendment shall not become effective except by favorable vote of three-fourths of all members of the Board of Commissioners.

5) Following final action by the Board of Commissioners, the Zoning Official shall make any necessary changes in the Zoning Map and shall maintain a written record of the type and date of such changes. Action by the Board of Commissioners shall be considered official seven (7) days after the date the change was accepted by the Board of Commissioners, even if the Zoning Official has failed to make the appropriate changes.

Montreat Zoning Ordinances Article XIII: Amendments

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6) The Board of Commissioners shall not reconsider a proposed change to the Official Zoning Map if such change is for the same property or portion thereof, for a period of one (1) year from the date of final determination of the prior request. This waiting period may be waived by a three-fourths vote of the Board of Commissioners if it determines that there may have been substantial changes in conditions or circumstances which may relate to the request.

**Town of Montreat
Board of Commissioners
Town Council Agenda Meeting
August 3, 2017
Walkup Building**

Board members present: Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Bill Gilliland
Commissioner Kent Otto
Commissioner Mary Standaert
Commissioner Ann Vinson

Board members absent: None

Town staff present: Alex Carmichael, Town Administrator
Dave Arrant, Police Chief
Steve Stackhouse, Finance Director & Deputy Town Clerk

Approximately 15 members of the public were also present. Mayor Helms called the meeting to order at 7:02 p.m., led the group in reciting the Pledge of Allegiance, and held a moment of silence.

Agenda Approval

Commissioner Vinson moved to adopt the agenda as presented. Commissioner Otto seconded. Mayor Pro Tem Fouche asked to change the Suggested Motion under Item D to the following: A discussion of the conversion of the Texas Road Bridge from a vehicular bridge to a pedestrian-only bridge with possible action. Mayor Pro Tem Fouche did not feel that a special meeting was needed to discuss this item. Commissioner Standaert felt that the public needed more time to absorb the information and wanted to leave the special meeting request as scheduled. Commissioner Otto did not feel that the recent information would change the outcome of the bridge and seconded Mayor Pro Tem Fouche's amended suggested motion. The amended motion passed 3/2 with Commissioners Standaert and Vinson voting in opposition to the motion. Mayor Pro Tem Fouche stated that she felt it was important for the public to attend the public forum next week to address this topic. Commissioner Gilliland moved to adopt the agenda as amended. Mayor Pro Tem seconded. The motion carried 3/2 with Commissioners Standaert and Vinson voting in opposition to the motion.

Mayor's Communications

Mayor Helms stated that he had a conversation with Mr. Carmichael earlier this week about locating a firm that will assist us with reviewing ordinances and regulations as they relate to Montreat. Mayor Helms foresees the possibility of a public input session and perhaps a citizens committee down the road.

Consent Agenda Review

The proposed Consent Agenda will include the following items:

- July 6, 2017, Town Council Agenda Meeting Minutes
- July 13, 2017, Town Council Public Forum Minutes
- July 13, 2017, Town Council Meeting Minutes
- June 8, 2017, Town Council Meeting Minutes

Town Administrator's Communications

- Mr. Carmichael will provide a verbal update on the Building Inspector/Code Enforcement Officer position and the Finance Office position.

Administrative Reports

The Board will hear administrative reports as written with the ability to ask questions from the Police Chief, Public Works Director, Finance Officer and Building Inspector/Code Administrator during next week's Town Council Meeting.

Public Comments

Mayor Helms reiterated that this Public Comment period was intended for remarks pertaining to items listed on the meeting agenda, including staff reports and communications.

There were no public comments at this time.

Old Business

There was no Old Business to discuss.

New Business

- A. FireWise Assessment for the Town of Montreat: Commissioner Vinson mentioned that Mrs. Nancy Midgett of 168 Oak Lane had been working with the Landcare Committee with regards to the FireWise Program. This proposed assessment, conducted by a member of the FireWise Staff from the State, takes about 2-3 hours and does not require any expenditure of funds for the Town. This will help the Town with the possibility of pursuing a FireWise Community Certification in the future.
- B. Appointment of Wade Burns to Board of Adjustment: Mr. Burns will be considered for an appointment to the Board of Adjustment for a term of two years to expire on January 31, 2019.

- C. Florida Terrace: The Council will call for a Public Hearing on Thursday, September 14th to rezone the eastern side of Florida Terrace from Industrial/Residential (I/R) to Residential Low-Density (R1) followed by possible action.
- D. Texas Road Bridge: A discussion will be held about the conversion of the Texas Road Bridge from a vehicular bridge to a pedestrian-only bridge with possible action.

Public Comments-Other Topics

Mayor Helms reiterated that the Public Comment period were for remarks pertaining to public business items not listed on the meeting agenda, including any reports or communications from other community entities.

There were no public comments at this time.

Commissioner Communications

Mayor Pro Tem Fouche asked Mr. Carmichael what the Town is doing for building permits and code enforcement requests. Mr. Carmichael stated there is an unofficial moratorium on zoning plan review at this time. Mr. Dan Cordell is being utilized to assist with basic permitting but is not doing any zoning footprint changes. In the month of July Town Staff, with the help of the Town Attorney and former Building Inspector/Code Enforcement Officer David Currie, have fielded numerous questions about planning and zoning. Approximately 21-22 permits inspections were fielded, 3-4 new permits were approved and 4 zoning permit requests were put on hold. Mr. Carmichael has been working to identify alternative models to a full time position. Mr. Carmichael has communicated with a number of developers, inspectors and Buncombe County to see what they could or could not assume. There is a capacity for Buncombe County to assist us but it could mean a loss of revenue for the Town of Montreat.

Mayor Helms asked Mr. Carmichael to bring everyone up-to-date on the CreekSide Property. Mr. Carmichael stated that our due diligence period ends on September 22nd. The Town Attorney is currently conducting a title search for the property. A regular inspection and a hazardous material inspection is scheduled for late August.

Upcoming Meeting Dates

Mayor Helms reviewed the following list of upcoming meeting dates and deadlines:

August Town Council Meeting:

August 10, 2017, 7:00 p.m.
Public Forum begins at 6:30 p.m.
Walkup Building

**Montreat Board of Commissioners
Town Council Agenda Meeting Minutes
August 3, 2017**

Rescheduled Sanitation Pickup:

Tuesday, August 22, 2017
Due to the solar eclipse on Monday the 21st

Montreat Tree Board:

August 22, 2017, 9:30 a.m.
Town Service Building

Town Services Office Closed:

In observance of Labor Day Holiday
September 4, 2017

Montreat Landcare:

September 6, 2017, 9:00 a.m.
Allen Building
Swannanoa Room

September Town Council Agenda Meeting:

September 7, 2017, 7:00 p.m.
Walkup Building

September Town Council Meeting:

September 14, 2017, 7:00 p.m.
Public Forum begins at 6:30 p.m.
Walkup Building

Board of Adjustment:

September 28, 2017, 7:00 p.m.
Walkup Building

Adjournment

There being no further business, Commissioner Gilliland moved to adjourn the Town Council Agenda Meeting. Commissioner Vinson seconded and the motion carried 5/0. The meeting was adjourned at 7:18 p.m.

Tim Helms, Mayor

Angela Murphy, Town Clerk

**Town of Montreat
Board of Commissioners
Town Council Public Forum
August 10, 2017
Walkup Building**

Board members present: Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Kent Otto
Commissioner Ann Vinson

Board members absent: Commissioner Bill Gilliland
Commissioner Mary Standaert

Town staff present: Alex Carmichael, Town Administrator
Angie Murphy, Town Clerk

Call to Order

Approximately 30 people were in attendance. Mayor Helms called the meeting to order at 6:33 p.m. and led the group in a moment of silence.

Agenda Approval

Mayor Pro Tem Fouche moved to adopt the agenda as presented. Commissioner Vinson seconded and the motion carried 3/0.

Public Forum

Mr. Tom Frist of 98 Frist Road, expressed his views about needing a turn-around on Texas Road, especially if it is going to be a pedestrian-only bridge, for the people who drop off their kids and grandkids at Clubs. Mr. Frist recommended removing the trash can in front of the Lake Park and constructing a turn-around in front of the Bill Wilde Youth Center. Mayor Pro Fouche stated she met with Mike Morse of MRA, Public Works Director Steve Freeman and Town Administrator Alex Carmichael and reviewed several locations where a turn-around could be implemented. Mr. Carmichael stated that there were property and rights-of-way considerations with regards to the MRA but this process is still ongoing.

Mr. Philip Arnold of 530 Magill Drive, stated that he was a member of the Town Audit Committee which exists to oversee the financial affairs of the Town. At a recent meeting it was mentioned there was some concern of the upcoming vacancy of the Finance Officer position. There is a rumor that the Council intends to hire a bookkeeper rather than an accountant type person. A motion was passed at the Audit Committee Meeting to have Mr. Arnold and Mr. Hugh Alexander discuss with Mr. Carmichael that there could be some risks involved if the Board chooses to take this path. Professionally Mr. Arnold is a Forensic Certified Public Accountant and he saw in his career that people lost money not because of dishonesty or theft but more to the fact that

employees were in over their heads with their job duties. Mr. Arnold feels a bookkeeper would not have sufficient skills to do the job of Finance Officer. North Carolina General Statute 159.25 sets very high standards for this job position. Mr. Arnold urged the Council to hire the best person for the job because that person would be the first line of protection for Montreat tax dollars.

Mr. Mike Sonnenberg of 125 Virginia Road, feels that a lot of things are brought before the Council before looking at the cost of human time versus money.

Mrs. Martha Campbell of 149 Maryland Place, asked when the new information about the Texas Road Bridge arose and who brought it to the Town's attention. Mr. Carmichael stated that while working on the categorical exclusion document he uncovered the information that will be presented this evening. Mr. Carmichael made the Council aware of the information and has spent a good amount of time researching the matter. Mr. Carmichael also stated that there were limitations to what he could say about this matter.

Mrs. Claire Frist of 98 Frist Road, asked if this information would be shared at a later time. Mr. Carmichael advised that it would not be shared.

Adjournment

There being no further discussion, Commissioner Vinson moved to adjourn the Public Forum Meeting. Commissioner Otto seconded and the motion carried 3/0. The meeting was adjourned at 6:49 p.m.

Tim Helms, Mayor

Angie Murphy, Town Clerk

**Town of Montreat
Board of Commissioners
Town Council Meeting
August 10, 2017
Walkup Building**

Board members present: Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Kent Otto
Commissioner Ann Vinson

Board members absent: Commissioner Bill Gilliland
Commissioner Mary Standaert

Town staff present: Alex Carmichael, Town Administrator
Dave Arrant, Police Captain/Interim Police Chief
Stefan Stackhouse, Finance Officer
Barry Creasman, Senior Water Operator
Angie Murphy, Town Clerk

Approximately 47 members of the public were also present. Mayor Helms called the meeting to order at 7:03 p.m., led the group in reciting the Pledge of Allegiance, and held a moment of silence.

Agenda Approval

Commissioner Otto moved to adopt the agenda as presented. Commissioner Vinson seconded and the motion carried 3/0.

Mayor's Communications

Mayor Helms stated that he has asked Mr. Carmichael to look into firms to review Montreat's four different books of ordinances to see if any of them could use some work. Mayor Helms hopes to involve citizen input to clean up some of the extraneous ordinances. This is a process that will take some time.

Consent Agenda Review

The proposed Consent Agenda will include the following items:

- July 6, 2017, Town Council Agenda Meeting Minutes
- July 13, 2017, Town Council Public Forum Minutes
- July 13, 2017, Town Council Meeting Minutes

Town Administrator's Communications

- Mr. Carmichael announced that Friday sanitation pickup will end on August 25th.
- The solar eclipse is on August 21st and we are postponing sanitation pickup until Tuesday, August 22nd for the safety of the Public Works employees. Mr. Carmichael advised that

there is a real and cumulative safety risk with regards to the eclipse and eyesight and suggested buying a pair of solar eclipse glasses.

- Mr. Carmichael was happy to report that the paving portion of Mecklenburg Circle and Louisiana Road has been completed. The asphalt is currently curing, which is a month long process, after which crews will begin curbing and side-dressing.
- Council asked Staff to look at various models for the finance officer position. Mr. Carmichael has spoken with Mr. Philip Arnold and Mr. Hugh Alexander, both who serve on the Montreat Audit Committee and have worked in finance and accounting fields for their opinions on the position. Mr. Carmichael has also spent some time with the School of Government Staff and the North Carolina Local Government Commission in identifying appropriate benchmark comparisons.
- The Council also asked Staff to look at various models for the Building Inspector/Code Enforcement Officer Position. Mr. Carmichael stated he was further along in this process. Mr. Carmichael has spoken with local developers, homebuilders, several different municipalities as well as Buncombe County and will have all data to the Commission in the next two weeks.
- Mr. Carmichael announced that Staff participated in a webinar for Legislative Updates in conjunction with the UNC School of Government and Land of the Sky Regional Council.

Administrative Reports

Police Chief: Reports were in written form as requested by Council. No questions were asked of the Interim Police Chief.

Public Works Director: Reports were in written form as requested by Council. No questions were asked of the Public Works Director.

Finance Officer: Reports were in written form as requested by Council. Commissioner Vinson asked why the deficit from last year was so large. Mr. Stackhouse stated that this document is still pending the finalization of the audit.

Building Inspector/Code Enforcement Officer: Mr. Carmichael stated that he is still trying to figure out the compilation software to prepare the monthly reports.

Public Comments

Mayor Helms reiterated that this Public Comment period was intended for remarks pertaining to items listed on the meeting agenda, including staff reports and communications.

Mrs. Alice Lentz of 115 Eastminster Terrace, stated that it was her privilege in the spring of 2016 to chair the Montreat Bridge Committee. The Montreat Bridge Committee's report of May 31, 2016 was submitted for Council's consideration and was posted immediately on the Town of Montreat's website. Mrs. Lentz stated that the first recommendation of the report (#1b) was to "develop an evacuation plan for the entire Town, in coordination with other town institutions, to be publicized and used in the event of a major, large-scale crisis or emergency." Mrs. Lentz would like to commend the Town Administrator for the recent communications about what to do in an emergency, and his clear articulation that what to do depends on the nature of the emergency. Mrs. Lentz also commends the Town Staff for its work in making available on the Town's website a color-coded map of Montreat. This map denotes exit routes that can be used. The measures recently communicated complement and fortify other Town procedures, such as the Code Red Emergency Notification System, which was already in place and have long been operational.

Mr. Tom Widmer of 218 Tennessee Road, also commended Town Staff for all their hard work on the emergency evacuation plan but suggested putting it on the side of the website where it would always be visible rather than in the body of the website which runs like a blog post. Mr. Widmer suggested putting the map on the Town bulletin board in the post office as well.

Old Business

There was no Old Business to discuss.

New Business

- A. FireWise Assessment for the Town of Montreat: Commissioner Vinson moved to complete a FireWise assessment for the Town of Montreat. Mayor Pro Tem Fouche seconded the motion. Commissioner Vinson stated that this project would be of no cost to the Town of Montreat. This is a step in looking seriously at Montreat becoming a FireWise Community. A member of the NC Forestry Service would drive around town and review sample homes, buildings and trees and provide a status check of where we are as a community. The discussion was completed and the motion carried 3/0.
- B. Appointment of Wade Burns to Board of Adjustment: Commissioner Otto moved to appoint Mr. Wade Burns to the Board of Adjustment for a term of two years to expire on January 31, 2019. Mayor Pro Tem seconded the motion. Commissioner Vinson questioned Mr. Burns on whether he would find it to be a problem to have to recuse himself from a situation he may have financial interest or involvement in. Mr. Burns assured the Board that he would have no problems recusing himself. The motion carried 3/0.
- C. Florida Terrace: Mayor Pro Tem Fouche moved to call for a Public Hearing on Thursday, September 14th to rezone the eastern side of Florida Terrace from Industrial/Residential (I/R) to Residential Low-Density (R1) followed by possible action. Commissioner Otto seconded. Commissioner Vinson stated that she was still trying to decide why they want to switch the

zoning. Commissioner Otto stated that it was predominantly residential at this time. He has spoken with MRA and the College and they do not have a need for this property at this time. Commissioner Otto stated that one or two homes built on the property would bring additional revenue to the Town. Mayor Pro Tem Fouche stated that 100% of the residents who would be affected by this change were in favor of it being zoned residential only. The motion passed 3/0.

- D. Texas Road Bridge: Mr. Carmichael read a brief summary of the events of the initial inspection, the closing down of the Texas Road Bridge, entrance into the Municipal Bridge Program and the vote by Council to convert to a pedestrian only bridge. During this period staff learned that the 2008 North Carolina Floodplain Management standards initially used for repairing the bridge for vehicular traffic was erroneously applied to the bridge. That standard is intended for inhabitable structures such as homes or office buildings, not for non-inhabitable structures such as a bridge. The erroneous 2008 premise that the cost of repairing the bridge would require elevating the bridge out of the floodplain set the Town on the path that potentially increased the size and cost of the project. If the bridge were deemed to be repairable, the Town may have been able to make those repairs without replacing the bridge.

Commissioner Otto stated that the Montreat Bridge Committee and members of the community were not happy with how the new bridge was designed and proposed. It was considered to be too large and too expensive. This was shared with the NCDOT when a group of delegates from Montreat traveled to Raleigh to negotiate the potential refunding of the monies spent on the bridge thus far. The DOT agreed to forgive approximately \$256,000 once the correct paperwork was submitted by September 15th. Commissioner Otto felt that this new information would have been beneficial ten years ago but knowing this information today just brings frustration. Safety was one of the main topics brought about by the Montreat Bridge Committee Report. Safety of Montreat residents, Montreat College, Mountain Retreat Association and Montreat Guests will continue to be a priority to the Town of Montreat. The Police Chief, Public Works Director and Town Manager have a safety plan and will continue to develop it as Montreat changes. Mayor Pro Tem Fouche will continue to work with the Town on an evacuation plan. This evacuation plan can be found on the Town's website. Commissioner Otto felt that it was not good business sense or good common sense to gamble with more of the taxpayer's money and he felt it best to continue with the plan of converting from a vehicular bridge to a pedestrian bridge.

Town Clerk Angie Murphy read an email sent by Commissioner Mary Standaert at the Mayor's request. Commissioner Standaert hoped there would be some discussion of the ethics of requesting and accepting federal and state tax dollars to pay for a vehicular bridge which Montreat has decided not to build. Commissioner Standaert realizes that from a fiduciary standpoint not having to return the money strengthens the Town's financial position. Commissioner Standaert felt that consideration should be given to returning the federal and state tax dollars for the purpose for which they were appropriated at the federal and state levels and made available to other communities. Commissioner Standaert stated that she

would be out of Town until the 24th of September but would be glad to discuss this with anyone when she returned.

Mayor Pro Tem Fouche stated that the Town Council owes its first duty, loyalty and obligation to the citizens of the Town of Montreat, and not to the State, the federal government, or to any other town that might benefit from the Municipal Bridge Program. The rules and regulations of that Program include a procedure for the waiver of the return of funds such as those received by Montreat should it change its plans. Mayor Pro Tem Fouche feels that it is not only legal, appropriate and ethical for Montreat to seek a waiver of the return of these funds, but that it would also be inappropriate, perhaps even neglectful, for the Town Council not to seek such a waiver. The law permitting a waiver was probably set up to help communities, especially small ones such as Montreat, to change their minds. The law seems to acknowledge the obvious fact that state and federal governments can more easily absorb such a loss than can towns such as Montreat. Mayor Pro Tem Fouche suggested that the decision to abandon the construction of the Texas Road Bridge and a waiver of the return of the \$231,000 should not be viewed as a “cost” of \$231,000 to the Municipal Bridge Program, but rather a “savings” of the approximately \$800,000-900,000 additional funds that the Program would otherwise have spent had the Town Council proceeded with the construction of a large bridge that a majority of its citizens did not want. Likewise, the decision of the current Town Council should not be viewed as the loss of the \$103,000 in local funds that it has already spent, but rather as a savings of the approximately \$200,000-300,000 in additional funds that it would have spent had it proceeded with the construction of the bridge.

There were no additional comments or discussion and no action took place on this topic.

Public Comments-Other Topics

Mayor Helms reiterated that the Public Comment period were for remarks pertaining to public business items not listed on the meeting agenda, including any reports or communications from other community entities.

Mr. Wade Burns of 232 North Carolina Terrace, questioned whether a vote had been taken with regards to his appointment to the Board of Adjustment. Town Clerk Angie Murphy assured Mr. Burns that a vote was taken and it passed unanimously.

Mr. Tanner Pickett of 102 Walker Street in Black Mountain, wanted to say thank you to the community on behalf of the Mountain Retreat Association. The summer youth conference season wrapped up last week and they are gearing up for a large women’s conference in the upcoming week.

Commissioner Communications

Commissioner Vinson thanked the Commissioners for moving forward with the FireWise Assessment.

Commissioner Otto felt that citizens are beginning to communicate in a positive way again. Commissioner Otto has heard a lot of dialogue about ordinances and regulations and would like to hear more specific details from the Community. Commissioner Otto also wished Mayor Pro Tem Fouche a very Happy Birthday.

Upcoming Meeting Dates

Mayor Helms reviewed the following list of upcoming meeting dates and deadlines:

<u>Rescheduled Sanitation Pickup:</u>	Tuesday, August 22, 2017 Due to the solar eclipse on Monday the 21 st
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<u>Montreat Tree Board:</u>	August 22, 2017, 9:30 a.m. Town Services Building
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<u>Town Services Offices Closed:</u>	September 4, 2017 in observance of Labor Day Sanitation Services will resume on September 5 th
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<u>Montreat Landcare:</u>	September 6, 2017, 9:00 a.m. Allen Building Swannanoa Room
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<u>September Town Council Agenda Meeting:</u>	September 7, 2017, 7:00 p.m. Walkup Building
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<u>September Town Council Meeting:</u>	September 14, 2017, 7:00 p.m. Public Forum begins at 6:30 p.m. Walkup Building
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<u>Board of Adjustment:</u>	September 28, 2017, 7:00 p.m. Walkup Building
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Adjournment

There being no further business, Commissioner Otto moved to adjourn the Town Council Meeting.

**Montreat Board of Commissioners
Town Council Meeting Minutes
August 10, 2017**

Commissioner Vinson seconded and the motion carried 3/0. The meeting was adjourned at 7:52 p.m.

Tim Helms, Mayor

Angela Murphy, Town Clerk

MONTHLY POLICE STATISTICS REPORT

AUGUST	2017	2016	2015	2014	2013
Mileage	2852	3402	2952	2503	3041
Dispatched Calls	98	143	102	101	115
Officer-Initiated Calls	506	245	252	201	229
Fire/EMS Assistance Calls	6F,3E	9F,6E	16F,12E	6F,7E	4F,3E
Motorist/Other Assistance Calls	103	49	81	54	52
Traffic Stops	38	37	35	21-63G	29
Parking Issues	5	7	6	3	7
Burglar/Fire Alarm Responses	2B,1F	3B,2F	2B,0F	5B,1F	5B
Residential House/Building Checks	260	254	211	272	114
Ordinance violations	2	21	21	13	11
LE Agency Assistance Calls	21	17	16	17	24
Animal Calls	4	5	5	9	9
Larcenies	0	0	0	0	0
B&E Calls	0	0	0	0	0
Suspicious Person/Vehicle Investigations	10V	10P,19V	8P,21V	12P,9V	11P,4V
Disturbance Calls	23	8	5	10	2
Accident Responses	3	0	2	0	2
Auxiliary Hours Worked	40R,36T	40R,30T	24R,48T	32R,32O	40R,148O
Truck turns at gate	5	2	2	2	3

- Town Service: 447
- MRA Service: 176
- College Service: 18

The beginning of August has seen the late summer transitions we've all become accustomed to. The MRA Youth Conferences came to a close. And after a brief lull, Montreat College began welcoming back new and returning students. This all happened smoothly and without incident.

The department itself has been busy with normal calls for service and daily activity. On several occasions, MPD has assisted BMPD with calls ranging from drug overdose, to firearms incidents, to a child locked inside a vehicle. There was also a multiagency driver checkpoint station. We also received an audit from the NC Standards and Training Division of the NCDOJ. All files and accompanying paperwork were found to be in 100% compliance. We also finished the remaining classroom portion of our annual In-Service requirements. As well as, a comprehensive departmental meeting, which included the mandatory covering of the Departmental Use of Force Policy.

There was one fairly significant collision this month, involving a van and a utility pole. The driver was uninjured and no charges were filed.

Also, Montreat has been seeing an uptick in our bear activity. Of particular concern is a mother and her cubs. This bear seems to be unusually aggressive when encountered. The MRA has posted signage as a warning to hikers. In fact, Montreat Streets Department closed a small section of Appalachian Way on the 30th in an effort to keep anyone from inadvertently crossing paths with them.

As always, we encourage everyone to reach out to the department for questions or concerns. We operate around the clock and every day.

General Fund
Statement of Revenues, Expenditures, and Changes in Fund Balances
For the Period Ended July 31, 2017

	FYE 2018 Budgeted	Previously Reported	Current Month	FYE 2018 YTD Actual	FYE 17 Comparison YTD Actual	FYE 2018 Remaining Budget	Actual to Budget %	Statement Period	Variance	7/31/16
								1		
Revenues:										
Ad valorem taxes	\$ 967,843.00		\$ -	\$ -		\$ 967,843.00				
Other taxes and licenses	\$ 425,600.00		\$ -	\$ -		\$ 425,600.00				
Unrestricted intergovernmental	\$ 105,983.00		\$ -	\$ -		\$ 105,983.00				
Permits and Fees	\$ 48,530.00		\$ 4,448.76	\$ 4,448.76	\$ 1,585.00	\$ 44,081.24				
Community Service Fee	\$ 45,000.00		\$ -	\$ -	\$ 9,514.00	\$ 45,000.00				
Sales and Services	\$ 12,050.00		\$ 294.00	\$ 294.00	\$ 1,219.00	\$ 11,756.00				
Investment earnings	\$ 6,800.00		\$ 467.21	\$ 467.21	\$ 165.17	\$ 6,332.79				
Other revenues	\$ 229,000.00		\$ 10,861.67	\$ 10,861.67	\$ 2,894.10	\$ 218,138.33				
Subtotal - Normal Operating	\$ 1,840,806.00	\$ -	\$ 16,071.64	\$ 16,071.64	\$ 15,377.27	\$ 1,824,734.36	0.87%	8.33%	-7.46%	-7.36%
<i>Restricted intergovernmental</i>	\$ 39,446.00		\$ -	\$ -		\$ 39,446.00				
<i>Contributions - Landcare</i>	\$ -		\$ -	\$ -		\$ -				
<i>Contributions - Open Space</i>	\$ -		\$ -			\$ -				
Total Revenues	1,880,252.00	-	16,071.64	16,071.64	\$ 15,377.27	1,864,180.36	0.85%	8.33%	-7.48%	-7.46%
Expenditures:										
Governing Body	\$ 72,229.00		\$ 230.02	\$ 230.02	\$ 798.07	\$ 71,998.98	0.32%	8.33%	8.01%	7.40%
Administration	\$ 298,139.00		\$ 30,003.49	\$ 30,003.49	\$ 47,032.33	\$ 268,135.51	10.06%	8.33%	-1.73%	-7.75%
Public Buildings	\$ 434,514.00		\$ 37,913.05	\$ 37,913.05	\$ 33,685.99	\$ 396,600.95	8.73%	8.33%	-0.39%	-15.68%
Police	\$ 416,300.00		\$ 24,411.30	\$ 24,411.30	\$ 26,986.17	\$ 391,888.70	5.86%	8.33%	2.47%	1.02%
Building & Zoning	\$ 84,519.00		\$ 6,163.61	\$ 6,163.61	\$ 8,093.47	\$ 78,355.39	7.29%	8.33%	1.04%	-1.28%
Public Works	\$ 130,219.00		\$ 6,289.87	\$ 6,289.87	\$ 7,075.97	\$ 123,929.13	4.83%	8.33%	3.50%	-0.47%
Streets	\$ 465,013.00		\$ 113,631.19	\$ 113,631.19	\$ 18,329.14	\$ 351,381.81	24.44%	8.33%	-16.10%	5.70%
Powell Bill	\$ -		\$ -	\$ -	\$ -	\$ -	0.00%	8.33%	0.00%	0.00%
Sanitation	\$ 100,037.00		\$ 9,309.38	\$ 9,309.38	\$ 6,326.29	\$ 90,727.62	9.31%	8.33%	-0.97%	2.79%
Env/Cons/Rec	\$ 7,000.00		\$ 220.22	\$ 220.22	\$ -	\$ 6,779.78	3.15%	8.33%	5.19%	8.33%
Total expenditures	2,007,970.00	\$ -	\$ 228,172.13	\$ 228,172.13	\$ 148,327.43	\$ 1,779,797.87	11.36%	8.33%	-3.03%	0.44%
Revenues over expenditures	(127,718.00)	\$ -	\$ (212,100.49)	\$ (212,100.49)	\$ (132,950.16)	\$ 84,382.49				
Other financing sources (uses):										
Transfer to/from Water Fund		\$ -	\$ -	\$ -	\$ -	\$ -				
Fund Balance Appropriated:	\$ 127,718.00	\$ -	\$ -	\$ -	\$ -	\$ 127,718.00				
Total other financing sources	\$ 127,718.00	\$ -	\$ -	\$ -	\$ -	\$ 127,718.00				
Revenues and other sources over expenditures and other uses	\$ -	\$ -	\$ (212,100.49)	\$ (212,100.49)	\$ (132,950.16)	\$ 212,100.49				
Expenditure Recap:										
Salaries & Benefits	\$ 939,449.00		\$ 69,159.28	\$ 69,159.28	\$ 81,493.25	\$ 870,289.72				
Other Operating	\$ 394,521.00		\$ 57,627.95	\$ 57,627.95	\$ 64,524.38	\$ 336,893.05				
CIP/Grant Projects	\$ 674,000.00		\$ 101,384.90	\$ 101,384.90	\$ 2,309.80	\$ 572,615.10				
Total Expenditures	\$ 2,007,970.00	\$ -	\$ 228,172.13	\$ 228,172.13	\$ 148,327.43	\$ 1,779,797.87				

Water Fund
Statement of Revenues, Expenditures, and Changes in Fund Balances
For the Period Ended July 31, 2017

	FYE 2016 Budgeted	Previously Reported	Current Month	FYE 2018 YTD Actual	FYE 17 Comparison YTD Actual	FYE 2018 Remaining Budget	Actual to Budget Percent	Statement Period	Variance	7/31/16
								1		
Revenues:										
Ad valorem taxes			\$ -			\$ -				
Other taxes and licenses			\$ -	\$ -		\$ -				
MRA Comm Svc Fee	\$ -		\$ -			\$ -				
Permits and Fees			\$ -			\$ -				
Sales and Services	\$ 315,700.00		\$ 32,844.42	\$ 32,844.42	\$ 32,387.83	\$ 282,855.58				
Investment earnings	\$ 193.00		\$ 23.13	\$ 23.13	\$ 20.08	\$ 169.87				
Other revenues	\$ 52,710.00		\$ 275.87	\$ 275.87	\$ 472.73	\$ 52,434.13				
Subtotal - Normal Operating	\$ 368,603.00	\$ -	\$ 33,143.42	\$ 33,143.42	\$ 32,880.64	\$ 335,459.58				
<i>Restricted intergovernmental</i>			\$ -			\$ -				
Total revenues	\$ 368,603.00	\$ -	\$ 33,143.42	\$ 33,143.42	\$ 32,880.64	\$ 335,459.58	8.99%	8.33%	0.66%	1.44%
Expenditures:										
Water Department	\$ 364,711.00	\$ -	\$ 4,607.75	\$ 4,607.75	\$ 3,653.68	\$ 360,103.25	1.26%	8.33%	7.07%	7.25%
Total expenditures	\$ 364,711.00	\$ -	\$ 4,607.75	\$ 4,607.75	\$ 3,653.68	\$ 360,103.25	1.26%	8.33%	7.07%	7.25%
Revenues over expenditures	\$ 3,892.00	\$ -	\$ 28,535.67	\$ 28,535.67	\$ 29,226.96	\$ (24,643.67)				
Other financing sources (uses):										
Transfers to/from General Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
Fund Balance Appropriated:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
Total other financing sources (uses)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
Revenues and other sources over expenditures and other uses	\$ 3,892.00	\$ -	\$ 28,535.67	\$ 28,535.67	\$ 29,226.96	\$ (24,643.67)				
Expenditure Recap:										
Salaries & Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
Other Operating	\$ 284,711.00		\$ 2,789.05	\$ 2,789.05	\$ 3,653.68	\$ 281,921.95				
CIP/Grant Projects	\$ 80,000.00		\$ 1,818.70	\$ 1,818.70	\$ -	\$ 78,181.30				
Total Expenditures	\$ 364,711.00	\$ 253,271.23	\$ 4,607.75	\$ 4,607.75	\$ 3,653.68	\$ 360,103.25				



TOWN OF MONTREAT

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MEMORANDUM

To: Board of Commissioners
From: Stefan Stackhouse, Finance Officer
Date: September 1, 2017
RE: July 2017 Financial Reports

Attached are the July 2017 financial reports. The fiscal year has just started, and readers should be cautioned that these few preliminary items tend not to be indicative of anything this early in the year. A few items to bring to your attention:

General Fund:

- Our general fund revenues are running slightly ahead of last year, thanks in part to the sale of surplus property which netted us \$8091.
- Our July expenditures are pretty much in line with prior years. A paving project expenses was posted to this fiscal year even though encumbered in the previous year because the invoice was received so late and the audit field work had already started.
- A follow up to the previous month's (June 2017) report: I had indicated that we might end the year with a deficit in the range of \$20,000 – 30,000. Since making that report, I was able to post a considerable amount of local sales tax and utility franchise fee distributions that were still due to us as of June 30. While I am still awaiting auditor adjustments, it now appears likely that we will end the fiscal year in surplus rather than in deficit. (We also had discussed the Appropriated Fund Balance. To clarify, we routinely budget a deficit covered by the Appropriated Fund Balance in order to give us a margin of safety. We always spend less than what was budgeted, and thus never use all – or in most years, any – of the Appropriated Fund Balance.)

Water Fund:

- Our total revenues for July are slightly higher than the same time last year..
- Our expenditures are also only slightly higher than July of last year.
- July is usually one of the months when we run the highest surplus, which continues to be the case this year.

Cash & Investments:

- Our total cash and investment in all accounts as of July 31, 2017 was \$2,769,288.33. This is a very strong position for mid-summer.
- We earned \$490.34 in interest for the month. Rates continue to improve slightly.

Town of Montreat			Cash & Investments Report			As of	July 31, 2017	
Institution	Type	Maturity Date	Balance	Central	General	Water	Int. Rate	Int for mo
Avl Sav Bank	Checking x2519		\$ 248,248.18	\$ 248,248.18			0.00%	\$ -
Avl Sav Bank	Cent'l Dep x 6863		\$ 3,266.41	\$ 3,266.41			0.00%	\$ -
Avl Sav Bank	Savings - Powell Bill 3572		\$ 190,879.76		\$ 190,879.76		0.10%	\$ 16.21
Avl Sav Bank	Savings - Water Res. 7727		\$ 58,206.79			\$ 58,206.79	0.10%	\$ 4.95
Avl Sav Bank	MMkt Acct xxx1204		\$ 1,582,402.45		\$ 1,582,402.45		0.31%	\$ 408.15
Avl Sav Bank	Subtotal		\$ 2,083,003.59					
BB&T	MMkt Act - General Fund		\$ 450,461.76		\$ 450,461.76		0.10%	\$ 38.26
BB&T	MMkt Act - Water Fund		\$ 157,641.92			\$ 157,641.92	0.10%	\$ 13.39
BB&T	Subtotal		\$ 608,103.68					
NCCMT	Investment - General Fund		\$ 6,470.86		\$ 6,470.86		0.85%	\$ 4.59
NCCMT	Investment - Water Fund		\$ 6,757.78			\$ 6,757.78	0.85%	\$ 4.79
NCCMT	Subtotal		\$ 13,228.64					
All Accts	Subtotal		\$ 2,704,335.91	\$ 251,514.59	\$ 2,230,214.83	\$ 222,606.49	0.22%	\$ 490.34
All Accts	Fiscal Year to Date		\$ 2,704,335.91				0.22%	\$ 490.34
			(average)				(average)	(cumulative)
Avl Sav Bank	CD, 1yr x6827 Empl Benf	11/24/2017	\$ 54,579.20		\$ 54,579.20		0.20%	
Avl Sav Bank	CD x5119	11/12/2017	\$ 10,373.22		\$ 10,373.22		0.20%	
CDs	Subtotal		\$ 64,952.42				0.20%	\$ -
All Accts + CDs	Total		\$ 2,769,288.33				0.21%	\$ 490.34
All Accts + CDs	Fiscal Year to Date		\$ 2,769,288.33				0.21%	\$ 490.34
			(average)				(average)	

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Revenue Statement

Period Ending: July 31, 2017

(ALL) All Departments

10 GENERAL FUND

Account Description	Account Number	Estimated Revenue	Activity This Period	Revenue To Date	Uncollected Percent To Date	Collected %
CY AD VALOREM TAXES	10-00-3005-100	967,843.00	0.00	0.00	967,843.00	0.00
TAX INTEREST & PENALTIES	10-00-3050-100	1,600.00	0.00	0.00	1,600.00	0.00
LOCAL SALES TAX	10-00-3065-100	410,000.00	0.00	0.00	410,000.00	0.00
CY DMV TAXES	10-00-3194-100	14,000.00	0.00	0.00	14,000.00	0.00
UTILITIES FRANCHISE TAX	10-00-3205-200	102,325.00	0.00	0.00	102,325.00	0.00
WINE & BEER TAX	10-00-3220-200	3,150.00	0.00	0.00	3,150.00	0.00
SOLID WASTE DISPOSAL TAX	10-00-3235-200	508.00	0.00	0.00	508.00	0.00
CONTRIBUTIONS	10-00-3300-300	2,000.00	2,000.00	2,000.00	0.00	100.00
PUBLIC SAFETY CHARGES	10-10-3305-300	3,850.00	0.00	0.00	3,850.00	0.00
POWELL BILL	10-20-3325-300	39,446.00	0.00	0.00	39,446.00	0.00
REIMBURSEMENT OF EXPENDITURE	10-10-3345-300	0.00	68.67	68.67	-68.67	0.00
COURT COSTS - ARREST FEES & F	10-10-3405-400	50.00	0.00	0.00	50.00	0.00
BUILDING PERMITS	10-10-3430-400	48,480.00	4,448.76	4,448.76	44,031.24	9.17
SANITATION FEES	10-10-3435-400	8,200.00	0.00	0.00	8,200.00	0.00
BACK DOOR PICKUP	10-10-3435-410	0.00	80.00	80.00	-80.00	0.00
SPECIAL PICKUP	10-10-3435-420	0.00	90.00	90.00	-90.00	0.00
PAYT	10-10-3435-430	0.00	124.00	124.00	-124.00	0.00
COMMUNITY SERVICE FEE	10-00-3550-800	45,000.00	0.00	0.00	45,000.00	0.00
INTEREST ON INVESTMENTS	10-00-3800-800	6,600.00	451.00	451.00	6,149.00	6.83
INTEREST INVESTMNT-POWELL BIL	10-00-3805-800	200.00	16.21	16.21	183.79	8.10
MISC REVENUE	10-00-3815-800	1,000.00	702.00	702.00	298.00	70.20
SALE OF FIXED ASSETS	10-00-3820-800	226,000.00	8,091.00	8,091.00	217,909.00	3.58
FUND BALANCE APPROPRIATED	10-00-3905-900	127,718.00	0.00	0.00	127,718.00	0.00
TOTAL FUND REVENUE:		2,007,970.00	16,071.64	16,071.64	1,991,898.36	0.80

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (4100) GOVERNING BODY							
SALARIES & WAGES	10-00-4100-020	9,800.00	0.00	0.00	0.00	9,800.00	0.00
PROFESSIONAL SERVICES	10-00-4100-040	45,000.00	0.00	0.00	0.00	45,000.00	0.00
FICA EXPENSE	10-00-4100-050	800.00	0.00	0.00	0.00	800.00	0.00
TRAVEL & TRAINING	10-00-4100-140	1,500.00	0.00	0.00	0.00	1,500.00	0.00
ADVERTISING	10-00-4100-260	2,000.00	0.00	0.00	0.00	2,000.00	0.00
DEPARTMENT SUPPLIES	10-00-4100-330	1,850.00	130.02	130.02	-50.00	1,769.98	4.32
SALARY CONTINGENCY	10-00-4100-332	15,000.00	0.00	0.00	0.00	15,000.00	0.00
CONTRACT SERVICES	10-00-4100-450	1,750.00	0.00	0.00	0.00	1,750.00	0.00
INDIRECT COST ALLOCATI	10-00-4100-480	-5,971.00	0.00	0.00	0.00	-5,971.00	0.00
CONTRIBUTIONS	10-00-4100-520	500.00	100.00	100.00	0.00	400.00	20.00
TOTAL DEPT: (4100) GOVERNING BODY		72,229.00	230.02	230.02	-50.00	72,048.98	0.24

Encumbrances & Expenditure Statement

(ALL) All Departments

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(D)

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (4200) ADMINISTRATION							
SALARIES & WAGES	10-00-4200-020	170,400.00	12,329.92	12,329.92	0.00	158,070.08	7.23
FICA EXPENSE	10-00-4200-050	13,300.00	979.46	979.46	0.00	12,320.54	7.36
GROUP INSURANCE	10-00-4200-060	26,200.00	1,866.06	1,866.06	0.00	24,333.94	7.12
RETIREMENT EXPENSE	10-00-4200-070	21,500.00	1,298.89	1,298.89	0.00	20,201.11	6.04
POSTAGE	10-00-4200-100	2,000.00	200.00	200.00	0.00	1,800.00	10.00
TELEPHONE	10-00-4200-110	5,200.00	372.89	372.89	0.00	4,827.11	7.17
TRAVEL & TRAINING	10-00-4200-140	15,071.00	642.18	642.18	0.00	14,428.82	4.26
M & R EQUIPMENT	10-00-4200-160	35,000.00	9,501.01	9,501.01	-217.80	25,716.79	26.52
ADVERTISING	10-00-4200-260	5,500.00	685.62	685.62	0.00	4,814.38	12.46
OFFICE EXPENSE	10-00-4200-320	3,000.00	369.96	369.96	-253.79	2,883.83	3.87
OFFICE EQUIPMENT	10-00-4200-330	2,600.00	0.00	0.00	0.00	2,600.00	0.00
BANK SERVICE CHARGE EX	10-00-4200-340	1,500.00	191.00	191.00	0.00	1,309.00	12.73
CONTRACT SERVICES	10-00-4200-450	21,000.00	112.50	112.50	-112.50	21,000.00	0.00
INDIRECT COST ALLOCATI	10-00-4200-480	-27,932.00	0.00	0.00	0.00	-27,932.00	0.00
DUES & SUBSCRIPTIONS	10-00-4200-530	3,300.00	1,454.00	1,454.00	0.00	1,846.00	44.06
SUPERVISOR'S EXPENSE	10-00-4200-550	500.00	0.00	0.00	0.00	500.00	0.00
TOTAL DEPT: (4200) ADMINISTRATION		298,139.00	30,003.49	30,003.49	-584.09	268,719.60	9.86

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(D)

10 GENERAL FUND

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (5000) PUBLIC BUILDINGS							
UTILITIES	10-00-5000-130	3,000.00	142.11	142.11	0.00	2,857.89	4.73
M & R BUILDINGS & GROU	10-00-5000-150	2,500.00	0.00	0.00	0.00	2,500.00	0.00
M & R EQUIPMENT	10-00-5000-160	5,200.00	585.93	585.93	-347.55	4,961.62	4.58
DEPARTMENT SUPPLIES	10-00-5000-330	200.00	0.00	0.00	0.00	200.00	0.00
INDIRECT COST ALLOCATI	10-00-5000-480	-11,386.00	0.00	0.00	0.00	-11,386.00	0.00
INSURANCE	10-00-5000-540	35,000.00	32,185.01	32,185.01	0.00	2,814.99	91.95
CAPITAL OUTLAY	10-00-5000-730	400,000.00	5,000.00	5,000.00	0.00	395,000.00	1.25
TOTAL DEPT: (5000) PUBLIC BUILDINGS		434,514.00	37,913.05	37,913.05	-347.55	396,948.50	8.64

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10 GENERAL FUND

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (5100) POLICE							
SALARIES & WAGES	10-10-5100-020	217,500.00	15,369.36	15,369.36	0.00	202,130.64	7.06
SEPARATION ALLOWANCE	10-10-5100-021	20,600.00	1,716.57	1,716.57	0.00	18,883.43	8.33
FICA EXPENSE	10-10-5100-050	18,300.00	1,172.05	1,172.05	0.00	17,127.95	6.40
GROUP INSURANCE	10-10-5100-060	45,500.00	3,026.00	3,026.00	0.00	42,474.00	6.65
RETIREMENT EXPENSE	10-10-5100-070	26,700.00	1,773.64	1,773.64	0.00	24,926.36	6.64
TELEPHONE	10-10-5100-110	2,500.00	120.03	120.03	0.00	2,379.97	4.80
TRAVEL & TRAINING	10-10-5100-140	500.00	114.41	114.41	0.00	385.59	22.88
M & R EQUIPMENT	10-10-5100-160	5,000.00	458.92	458.92	0.00	4,541.08	9.17
M & R AUTO	10-10-5100-170	4,000.00	187.12	187.12	-111.57	3,924.45	1.88
PUBLIC ED - SAFETY SAT	10-10-5100-234	500.00	0.00	0.00	0.00	500.00	0.00
AUTO SUPPLIES (GAS, OIL)	10-10-5100-310	10,000.00	391.41	391.41	0.00	9,608.59	3.91
MEDICAL CERTIFICATION	10-10-5100-320	1,000.00	0.00	0.00	0.00	1,000.00	0.00
DEPARTMENT SUPPLIES	10-10-5100-330	2,500.00	50.00	50.00	0.00	2,450.00	2.00
UNIFORMS	10-10-5100-360	2,200.00	31.79	31.79	0.00	2,168.21	1.44
DUES & SUBSCRIPTIONS	10-10-5100-530	300.00	0.00	0.00	0.00	300.00	0.00
CAPITAL OUTLAY	10-10-5100-730	40,000.00	0.00	0.00	0.00	40,000.00	0.00
DISPATCHER SERVICES	10-10-5100-760	19,200.00	0.00	0.00	0.00	19,200.00	0.00
TOTAL DEPT: (5100) POLICE		416,300.00	24,411.30	24,411.30	-111.57	392,000.27	5.83

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10 GENERAL FUND

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (5400) BUILDING & ZONING							
SALARIES & WAGES	10-10-5400-020	52,175.00	4,578.50	4,578.50	0.00	47,596.50	8.77
FICA EXPENSE	10-10-5400-050	3,991.00	349.42	349.42	0.00	3,641.58	8.75
GROUP INSURANCE	10-10-5400-060	9,084.00	756.50	756.50	0.00	8,327.50	8.32
RETIREMENT EXPENSE	10-10-5400-070	6,569.00	434.68	434.68	0.00	6,134.32	6.61
TELEPHONE	10-10-5400-110	800.00	44.51	44.51	0.00	755.49	5.56
TRAVEL & TRAINING	10-10-5400-140	2,500.00	0.00	0.00	0.00	2,500.00	0.00
M & R EQUIPMENT	10-10-5400-160	3,550.00	0.00	0.00	0.00	3,550.00	0.00
M&R AUTO	10-10-5400-170	700.00	0.00	0.00	0.00	700.00	0.00
AUTO SUPPLIES	10-10-5400-310	800.00	0.00	0.00	0.00	800.00	0.00
DEPARTMENT SUPPLIES	10-10-5400-330	1,500.00	0.00	0.00	0.00	1,500.00	0.00
PLANNING BOARD	10-10-5400-331	250.00	0.00	0.00	0.00	250.00	0.00
BOARD OF ADJUSTMENT	10-10-5400-332	250.00	0.00	0.00	0.00	250.00	0.00
CONTRACT SERVICES - BU	10-10-5400-450	1,250.00	0.00	0.00	0.00	1,250.00	0.00
FIRE INSPECTIONS	10-10-5400-451	250.00	0.00	0.00	0.00	250.00	0.00
DUES & SUBSCRIPTIONS	10-10-5400-530	850.00	0.00	0.00	0.00	850.00	0.00
TOTAL DEPT: (5400) BUILDING & ZONING		84,519.00	6,163.61	6,163.61	0.00	78,355.39	7.29

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(ALL) All Departments

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10 GENERAL FUND

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (5550) PUBLIC WORKS							
SALARIES & WAGES	10-20-5550-020	61,440.00	4,408.32	4,408.32	0.00	57,031.68	7.17
SEPARATION ALLOWANCE	10-20-5550-021	10,800.00	0.00	0.00	0.00	10,800.00	0.00
FICA EXPENSE	10-20-5550-050	5,526.00	337.26	337.26	0.00	5,188.74	6.10
GROUP HEALTH INSURANCE	10-20-5550-060	9,084.00	756.50	756.50	0.00	8,327.50	8.32
RETIREMENT EXPENSE	10-20-5550-070	7,735.00	543.99	543.99	0.00	7,191.01	7.03
TELEPHONE	10-20-5550-110	700.00	40.01	40.01	0.00	659.99	5.71
TRAVEL & TRAINING	10-20-5550-140	1,200.00	0.00	0.00	0.00	1,200.00	0.00
M&R TRUCKS	10-20-5550-170	500.00	0.00	0.00	0.00	500.00	0.00
AUTO SUPPLIES	10-20-5550-310	3,500.00	203.79	203.79	0.00	3,296.21	5.82
DEPARTMENTAL SUPPLIES	10-20-5550-330	2,500.00	0.00	0.00	0.00	2,500.00	0.00
UNIFORMS	10-20-5550-360	500.00	0.00	0.00	0.00	500.00	0.00
SEWERMATER PROGRAM	10-20-5550-370	2,500.00	0.00	0.00	0.00	2,500.00	0.00
INDIRECT COST ALLOCATI	10-20-5550-480	-10,766.00	0.00	0.00	0.00	-10,766.00	0.00
CAPITAL OUTLAY	10-20-5550-730	35,000.00	0.00	0.00	0.00	35,000.00	0.00
TOTAL DEPT: (5550) PUBLIC WORKS		130,219.00	6,289.87	6,289.87	0.00	123,929.13	4.83

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10 GENERAL FUND

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (5600) STREET DEPARTMENT							
SALARIES & WAGES	10-20-5600-020	103,588.00	8,683.09	8,683.09	0.00	94,904.91	8.38
FICA EXPENSE	10-20-5600-050	7,925.00	659.74	659.74	0.00	7,265.26	8.32
GROUP INSURANCE	10-20-5600-060	27,252.00	2,319.00	2,319.00	0.00	24,933.00	8.50
RETIREMENT EXPENSE	10-20-5600-070	13,043.00	1,071.49	1,071.49	0.00	11,971.51	8.21
TELEPHONE	10-20-5600-110	0.00	40.01	40.01	0.00	-40.01	0.00
TRAVEL & TRAINING	10-20-5600-140	2,000.00	900.00	900.00	0.00	1,100.00	45.00
M & R EQUIPMENT	10-20-5600-160	2,000.00	0.00	0.00	0.00	2,000.00	0.00
M & R TRUCKS	10-20-5600-170	3,500.00	61.20	61.20	0.00	3,438.80	1.74
AUTO SUPPLIES (GAS, OIL)	10-20-5600-310	8,000.00	347.27	347.27	0.00	7,652.73	4.34
DEPARTMENT SUPPLIES -	10-20-5600-330	5,000.00	21.98	21.98	-21.98	5,000.00	0.00
REPAIRING AND WIDENING	10-20-5600-340	40,000.00	0.00	0.00	0.00	40,000.00	0.00
UNIFORMS	10-20-5600-360	2,000.00	0.00	0.00	0.00	2,000.00	0.00
CONTRACT SERVICE	10-20-5600-450	12,000.00	727.68	727.68	0.00	11,272.32	6.06
INDIRECT COST ALLOCATI	10-20-5600-480	-38,445.00	0.00	0.00	0.00	-38,445.00	0.00
CAPITAL OUTLAY	10-20-5600-730	199,000.00	96,384.90	96,384.90	-95,230.00	197,845.10	0.58
STREET LIGHTING	10-20-5600-740	23,500.00	1,659.27	1,659.27	0.00	21,840.73	7.06
STORMWATER IMPROVEMENT	10-20-5600-745	3,000.00	0.00	0.00	0.00	3,000.00	0.00
ROAD MAINTENANCE	10-20-5600-750	8,000.00	373.66	373.66	-373.66	8,000.00	0.00
SIGNS AND PAINTING	10-20-5600-755	4,500.00	381.90	381.90	0.00	4,118.10	8.48
BRIDGE INSPECTION	10-20-5600-760	2,000.00	0.00	0.00	0.00	2,000.00	0.00
SURVEYS AND MAPPING	10-20-5600-765	2,000.00	0.00	0.00	0.00	2,000.00	0.00
SNOW REMOVAL	10-20-5600-770	2,000.00	0.00	0.00	0.00	2,000.00	0.00
DEBT PAYMENT	10-20-5600-900	33,150.00	0.00	0.00	0.00	33,150.00	0.00
TOTAL DEPT: (5600) STREET DEPARTMENT		465,013.00	113,631.19	113,631.19	-95,625.64	447,007.45	3.87

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Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (5800) SANITATION							
SALARIES AND WAGES	10-30-5800-020	34,558.00	2,710.92	2,710.92	0.00	31,847.08	7.84
CONTRACT SERVICES	10-30-5800-040	15,000.00	1,546.32	1,546.32	0.00	13,453.68	10.30
FICA EXPENSE	10-30-5800-050	2,644.00	207.39	207.39	0.00	2,436.61	7.84
GROUP HEALTH INSURANCE	10-30-5800-060	9,084.00	1,476.00	1,476.00	0.00	7,608.00	16.24
RETIREMENT - LOCAL GOV	10-30-5800-070	4,351.00	334.53	334.53	0.00	4,016.47	7.68
TELEPHONE	10-30-5800-110	750.00	43.76	43.76	0.00	706.24	5.83
UTILITIES	10-30-5800-130	500.00	45.01	45.01	0.00	454.99	9.00
M & R EQUIPMENT	10-30-5800-160	400.00	9.95	9.95	0.00	390.05	2.48
M & R - TRUCKS	10-30-5800-170	1,500.00	10.69	10.69	-10.69	1,500.00	0.00
AUTO SUPPLIES	10-30-5800-310	5,000.00	213.06	213.06	0.00	4,786.94	4.26
SUPPLIES/TOOLS	10-30-5800-330	1,000.00	9.98	9.98	-9.98	1,000.00	0.00
UNIFORMS	10-30-5800-360	750.00	0.00	0.00	0.00	750.00	0.00
CONTRACT - DUMPSTER SE	10-30-5800-451	12,500.00	1,621.18	1,621.18	304.65	10,574.17	15.40
TIPPING FEES	10-30-5800-550	12,000.00	1,080.59	1,080.59	0.00	10,919.41	9.00
TOTAL DEPT: (5800) SANITATION		100,037.00	9,309.38	9,309.38	283.98	90,443.64	9.58

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Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (6190) ENVIRONMENT, CONSERVATION & RECREATION							
LANDCARE	10-80-6190-340	2,000.00	220.22	220.22	-209.27	1,989.05	0.54
OPEN SPACE CONSERVATIO	10-80-6190-710	5,000.00	0.00	0.00	0.00	5,000.00	0.00
TOTAL DEPT: (6190) ENVIRONMENT, CONSERVATION & REC		7,000.00	220.22	220.22	-209.27	6,989.05	0.15
TOTAL FUND: (10) GENERAL FUND		2,007,970.00	228,172.13	228,172.13	-96,644.14	1,876,442.01	6.55

09/01/17
16:47:22

Fiscal Year: 2018
Fiscal Month Range: 1-1

TOWN OF MONTREAT

Revenue Statement

Period Ending: July 31, 2017

30 WATER FUND

Selected Department
(ALL) All Departments

Page 2

Account Description	Account Number	Estimated Revenue	Activity This Period	Revenue To Date	Uncollected Percent To Date	Collected %
MSD BILLING FEES REVENUE	30-91-3400-400	20,910.00	0.00	0.00	20,910.00	0.00
WATER SALES	30-91-3500-500	146,575.00	18,760.57	18,760.57	127,814.43	12.79
WATER ACCESS FEES	30-91-3500-600	169,125.00	14,083.85	14,083.85	155,041.15	8.32
BILLING FEE REVENUE	30-91-3500-800	0.00	90.65	90.65	-90.65	0.00
WATER TAPS	30-91-3505-500	900.00	0.00	0.00	900.00	0.00
WATER TRANSFER FEES	30-91-3505-700	900.00	0.00	0.00	900.00	0.00
SPECIAL ASSESSMENTS REVENUE	30-91-3610-600	27,000.00	0.00	0.00	27,000.00	0.00
INTEREST ON INVESTMENTS	30-91-3805-800	193.00	23.13	23.13	169.87	11.98
MISC REVENUE	30-91-3810-800	1,000.00	0.00	0.00	1,000.00	0.00
LATE FEES	30-91-3815-800	2,000.00	185.22	185.22	1,814.78	9.26
TOTAL FUND REVENUE:		368,603.00	33,143.42	33,143.42	335,459.58	8.99
TOTAL REVENUE:		2,376,573.00	49,215.06	49,215.06	2,327,357.94	2.07%

TOWN OF MONTREAT

Selected Department

Page 10

Fiscal Year: 2018

Encumbrances & Expenditure Statement

(ALL) All Departments

Fiscal Month Range: 1-1

Period Ending: July 31, 2017

09/01/17

16:47:11

(D)

30 WATER FUND

Account Description	Account No	Budget Amount	Activity This Period	Expenditure Year to Date	Encumbrance Year to Date	Unencumbered Balance	% Spent
DEPT (8100) WATER DEPARTMENT							
WATER SAMPLES	30-91-8100-030	8,500.00	30.00	30.00	-30.00	8,500.00	0.00
COOP - WATER PURCHASES	30-91-8100-090	500.00	0.00	0.00	0.00	500.00	0.00
POSTAGE	30-91-8100-100	3,000.00	0.00	0.00	0.00	3,000.00	0.00
TELEPHONE	30-91-8100-110	2,500.00	43.76	43.76	0.00	2,456.24	1.75
UTILITIES	30-91-8100-130	30,000.00	2,290.65	2,290.65	0.00	27,709.35	7.63
TRAVEL & TRAINING	30-91-8100-140	2,000.00	0.00	0.00	0.00	2,000.00	0.00
M & R WELLS	30-91-8100-150	28,000.00	215.93	215.93	-215.93	28,000.00	0.00
M & R EQUIPMENT	30-91-8100-160	10,000.00	0.00	0.00	0.00	10,000.00	0.00
AUTO SUPPLIES	30-91-8100-310	5,500.00	208.71	208.71	0.00	5,291.29	3.79
DEPARTMENT SUPPLIES	30-91-8100-330	2,500.00	0.00	0.00	0.00	2,500.00	0.00
INDIRECT COST ALLOCATI	30-91-8100-480	94,500.00	0.00	0.00	0.00	94,500.00	0.00
DEES & SUBSCRIPTIONS	30-91-8100-530	2,000.00	0.00	0.00	0.00	2,000.00	0.00
CAPITAL OUTLAY	30-91-8100-730	80,000.00	1,818.70	1,818.70	-1,818.70	80,000.00	0.00
DEBT PAYMENT	30-91-8100-900	95,711.00	0.00	0.00	0.00	95,711.00	0.00
TOTAL DEPT: (8100) WATER DEPARTMENT		364,711.00	4,607.75	4,607.75	-2,064.63	362,167.88	0.69
TOTAL FUND: (30) WATER FUND							
		364,711.00	4,607.75	4,607.75	-2,064.63	362,167.88	0.69
TOTAL EXPENDITURES							
		2,372,681.00	232,779.88	232,779.88	-98,708.77	2,238,609.89	5.65

Public Works Summary

September

Sanitation: Bi-weekly pickup is over for the summer it will resume on June 1, 2018.

The next Bulk Pickup will be on October 31, 2017.

Streets: Mowing continues.

The crew is getting ready for leaf season.

Most of the patching has been done (18 tons of asphalt)

We had one tree down on Greybeard across roadway.

Water: We had 3 water leaks:

6 inch main on South Carolina Terrace

3 quarter inch service on Lookout Terrace

2-3 inch valves in a well



Town of Montreat

P.O. Box 423, Montreat, North Carolina 28757

Phone: (828) 669-8002 • Fax: (828) 669-3810

MEMORANDUM: DEVELOPMENT SERVICES

TO: MONTREAT BOARD OF COMMISSIONERS
FROM: ALEX CARMICHAEL, TOWN ADMINISTRATOR
SUBJECT: DEVELOPMENT SERVICES PERSONNEL NEEDS ANALYSIS
DATE: SEPTEMBER 7, 2017
ATTACHEMENTS: FEE SCHEDULE, JOB DESCRIPTION, ZONING MAP

Action by the Montreat Town Commission is only required if the Commission wishes to change the model of service delivery.

Background: In early July of 2017, the Town of Montreat's Building Inspector/Code Administrator resigned his position. At the July 13th regular meeting, the Town Commission directed staff to investigate alternative models of service delivery. This memo outlines the Development Services responsibilities of the Town, revenue and expense limitations, the functions the position has provided, and possible alternative models.

Revenues: Each year the Town of Montreat adopts a fee schedule in conjunction with the annual budget (attached.) The majority of fees associated with this function fall into the categories of Building Permits and Inspection Fees or Planning and Zoning Fees. (Table A details the permits and inspection totals for the last five years). The average annual revenue over the past five fiscal years for both categories is \$42,444.69 (Table B.)

Table A

	Zoning Permits	Bldg Permits	Bldg Inspect	Re-Insp	Fire Ins	Sign Permits	Variance Req
2017 TOTALS	6	56	117	12	47	0	0
2016 TOTALS	7	121	387	44	37	2	1
2015 TOTALS	101	120	306	38	47	2	2
2014 TOTALS	20	106	356	48	47	1	4
2013 TOTALS	8	130	370	21	47	2	0
2012 TOTALS	18	114	316	51	36	10	1
AVERAGE	30.8	118.2	347	40.4	42.8	3.4	1.6
* 2017 January to June only							
** Annual average for years 2012-2016							

Table B

Planning and Zoning/ Building Permit Fee Revenue					
Year	2013	2014	2015	2016	2017
Debit	\$ 49,129.11	\$ 29,264.00	\$ 552.00	\$ 637.00	\$ 5,532.75
Credit		\$ 85,899.74	\$ 31,860.57	\$ 37,181.61	\$ 44,138.18
Net Transactions	\$ (49,129.11)	\$ (56,635.74)	\$ (31,308.57)	\$ (36,544.61)	\$ (38,605.43)
			Average		\$ (42,444.69)

Personnel Expenses: The Building Inspector/ Code Administrator position is a grade fifteen, with a starting salary of \$41,795. When accounting for benefits and employer expenses (FICA, retirement, 401k, and health premiums) the total compensation for the position equals \$59,328.62 (Table C.)

Table C

Position Estimate		
FYE 2018		
Item		Amount
Salary		\$ 41,795.00
Longevity Bonus		\$ -
Subtotal: Wages		\$ 41,795.00
Employer FICA		\$ 3,197.32
LGERS		\$ 3,067.75
NC401K		\$ 2,089.75
Monthly Health In. Premium	\$ 764.90	
Annual Health In. Premium		\$ 9,178.80
Total Compensation		\$ 59,328.62

The gap between the personnel expense (\$59,328.93 total compensation) and the revenues generated by inspection and permit fees (\$42,444.69) equals \$16,883.93, or 28.46%.

Zoning Official Responsibilities: The Building Inspector/ Code Administrator carries with it the designation of the “Zoning Official.” State law and Montreat Ordinances require the Town to provide certain functions related to Development Services through the officer designated as the Zoning Official.

Duties of the Zoning Official:

- Must take an oath of office
- Process all applications
- Explain the ordinance requirements to the public
- Make application forms available
- Review applications to verify the information provided
- Assess the application’s compliance with the terms of the zoning ordinance
- Issue all routine permits
- Make interpretations of the ordinances and issue determinations as to zoning compliance
- Make inspections during and at the conclusion of the permitted work to assure that ordinance requirements have been met.
- Investigate complaints and initiate enforcement actions when violations are discovered
- Prepare reports, assure proper notice and report on cases for the planning board and board of adjustment
- Maintain all appropriate records
- Inspection of potential violations
- Initiate enforcement action
- Issue formal stop work orders

Three Functional Areas of the Job: The Building Inspector/ Code Administrator position represents a conglomeration of diverse functions that together provide what other municipalities might call “Development Services.” This umbrella of Development Services is responsible for at least three distinct functional areas:

- Zoning Administration
- Building Inspections and Permitting
- Flood Plain Administration

Zoning Administration

The legal authority for this functional area comes from the Montreat Zoning Ordinance and North Carolina state statutes. The provision of technical staff support for the Planning and Zoning Commission and the Board of Zoning Adjustment fall under this function. Building plan approval, conservation, landscape design, sign regulations, and code enforcement are examples of issues addressed by this function.

Building Inspections and Permitting

The legal authority for this functional area comes from the Montreat Code of General Ordinances and North Carolina state statutes. Building code, fire prevention, stormwater, hillside development, and code enforcement are examples of issues addressed by this function.

Flood Plain Administration

The legal authority for this functional area comes from the Montreat Code of General Ordinances and North Carolina state statutes. Flood Damage Prevention and Soil Erosion and Sedimentation Control examples of issues addressed by this function.

Dividing the Functional Areas: The position can either continue to be one fulltime, consolidated position or divided into the functional areas of Building Inspections and Permitting in one position and Zoning and Flood Plain Administration in another. A part time Zoning/ Flood Plain Administrator could be established by dividing the base salary of the existing position by a certain amount of time the employee was expected to provide services, such as two out of five days a week. Two fifths of the base salary would equal \$16,718 annually. However, given the level of training and experience required by this function and the limited employment opportunity this would present, it is likely that the Town would experience difficulty recruiting and retaining qualified and interested employees for such an arrangement.

Another option would be to contract a fulltime employee for part time work. The Town of Biltmore Forest is in a similar situation as the Town of Montreat, requiring Zoning Administration functions at a part time level. Montreat staff is working with the Town of Biltmore Forest and the Land of Sky Council of Governments to propose a model that would benefit all three organizations. Under such a proposal the Land of Sky could hire a fulltime Planner I and would contract out that person to each municipality for two days a week. Montreat would pay two fifths of the salary, benefits, and indirect costs associated with the position. The cost to Montreat is estimated to be in a range between \$23,374.54 and \$34,127, with a mean of \$28,750.77.

Four Staffing Models:

Model 1: Fulltime Consolidated Position

This would be a continuation of the current staffing model. Though the Town would experience a cost savings for the number of months the position has remained vacant, those savings are likely to be offset by training and continuing education requirements of a new hire. Therefore we can reasonably expect this model to continue to cost the total compensation amount of \$59,328.93.

Current Spending	\$59,328.93
Estimated Cost	\$59,328.93
<i>Net Savings</i>	<i>\$0</i>

Option 2: Part Time Zoning/ Flood Plain Administrator with Buncombe County Providing Building Inspection and Permitting Services

This model would divide the Development Services functions between Zoning/ Flood Plain Administration and Building Inspection and Permitting Services. The part time Zoning/ Flood Plain Administrator position would be established through the means described above. Buncombe County is able to provide Building Inspection and Permitting service for municipalities. If the County were to take over these services it would charge the property owners directly and would not charge the Town. However, the Town would no longer generate the associated revenue. The Town may lose approximately \$32,000 in revenues for Building Inspections and Permits. Such a model is likely to cost the Town more than it saves.

Current Spending	\$59,328.93
Estimated Zoning Position Cost	\$28,750.77
Revenue Change	-\$32,000.00
<i>Net Savings</i>	<i>-\$1,421.84</i>

Part Time Zoning/ Flood Plain Administrator with Private Company Providing Building Inspection and Permitting Services

This model would also divide the Development Services functions between Zoning/ Flood Plain Administration and Building Inspection and Permitting Services. The part time Zoning/ Flood Plain Administrator position would be established through the means described above. Notably, under this model the Town would continue charging fees for both Zoning Permits and Building Inspections and Permits.

Staff has sought price estimates and has received one quote of approximately \$78.5 per hour. This is substantially higher than the hourly rate provided for the current position. Even if only fifteen hours a week were devoted to these functions such a model would cost the Town more than \$56,520 annually for just the Building Inspections and Permitting function.

Current Spending	\$59,328.93
Estimated Zoning Position Cost	\$28,750.77
Building Insp. and Permit	\$56,520.00
<i>Net Savings</i>	<i>-\$25,941.84</i>

Part Time Zoning/ Flood Plain Administrator with Individual Contractor Providing Building Inspection and Permitting Services

This model would also divide the Development Services functions between Zoning/ Flood Plain Administration and Building Inspection and Permitting services. The part time Zoning/ Flood Plain Administrator position would be established through the means described above. Currently, the Town is contracting the Building Inspections and Permitting function at the rates of \$25 per inspection and \$25 per permit. There may be an opportunity to continue this arrangement for one to three years. The most commonly requested inspections and permits cost \$100 or more. So under this model, Montreat would roughly be able to retain 75% or greater of its Building Inspection and Permitting revenue. The downside of this model is that the solution it represents is only temporary.

Current Spending	\$59,328.93
Estimated Zoning Position Cost	\$28,750.77
Building Insp. and Permit	\$8,000.00
<i>Net Savings</i>	<i>\$22,578.16</i>

Comments:

Though it easy to quantify the total compensation expenses related to a fulltime consolidated position, it is difficult to quantify the benefits. Having in-house, on-demand expertise presents an opportunity to benefit property owners, builders, staff, and the elected and appointed boards of Montreat. Furthermore, such a position allows the employee to maintain consistency in interpretation and to build ongoing relationships with community members. Finally, dividing the position runs a risk for a decline in service, either in speed or quality of product. The

Commission must weigh the costs of these factors against the opportunity to reorganize and reduce cost for Montreat tax payers.

Addenda:

1. Job Description
2. Montreat Fee Schedule
3. Zoning Map

JAC

**Town of Montreat
Building Inspector/Code Administrator
Grade 15**

BUILDING INSPECTOR/CODE ADMINISTRATOR

General Statement of Duties

Performs building, zoning, housing, fire prevention and other inspections; reviews plans and specifications to ensure compliance of buildings and properties with all pertinent regulatory codes and ordinances; performs routine professional planning functions; and performs related work as required.

Distinguishing Features of the Class

An employee in this class performs a variety of skilled technical functions. Work involves reviewing site plans, interpreting and enforcing regulatory codes and ordinances, inspecting residential and commercial building construction, and performing routine planning duties. Considerable tact, courtesy, and firmness are required in the dealing with the public. Work is performed in accordance with North Carolina General Statutes, Town ordinances, codes and policies, and standard procedures governing the responsibilities of Building Inspectors in North Carolina. Work is performed under the day-to-day supervision of the Town Administrator with oversight from the Board of Commissioners. Work is evaluated through observation, reports, review of records and files maintained, effectiveness of legal compliance with applicable statutes and ordinances and by public satisfaction with services provided.

Duties and Responsibilities

Essential Duties and Tasks

Reviews site plans, blueprints and specifications submitted for construction projects to ensure code compliance.

Interprets and enforces all adopted regulatory codes and ordinances pertaining to building construction; meets with architects, engineers, contractors, developers, property owners and others to discuss plan review and inspection procedures and results.

Inspects residential and commercial building construction for compliance with codes in five trade areas and with fire prevention codes; monitors the construction of foundations and framing; notifies responsible parties of defects, and reinspects to determine if corrective actions have been taken; issues stop work orders; prepares cases for prosecution in the event of noncompliance; testifies in court as necessary.

Conducts minimum housing code inspections.

Issues certificates of occupancy when properties pass inspection.

Enforces zoning, stormwater and flood prevention ordinances.

Prepares and maintains inspection and permit records.

Planning and developing short and long range planning activities, services and programs.

Serves as technical staff to the Planning and Zoning Commission and Board of Adjustment.

Assists in coordinating department activities and functions with those of other Town departments, counties and outside agencies as appropriate.

Receives and responds to inquiries, concerns, complaints and requests for assistance regarding areas of responsibility.

Attends training, workshops, meetings, etc., to enhance job knowledge and skills and maintain certifications.

Performs general clerical work as required, including preparing reports and correspondence, entering and retrieving computer data, operating a variety of computer software, copying and filing documents, answering the telephone, attending meetings, etc.

Additional Job Duties

Performs related duties as required.

Recruitment and Selection Guidelines

Knowledges, Skills, and Abilities

Considerable knowledge of federal, state and local building and trade rules, regulations, guidelines, codes and ordinances.

Considerable knowledge of technical ordinance, codes and regulations pertaining to code enforcement practices, principles, procedures and methods and to land use planning and development including zoning and subdivision principles.

Considerable knowledge of current building construction methods, materials, tools and equipment.

Working knowledge of conducting building inspections and providing uniform enforcement of codes and ordinances.

Working knowledge of the corrective measures common to the field.

Working knowledge in providing technical guidance and alternatives to work in progress.

General knowledge of the principles and practices of planning and recent developments in the field.

General knowledge of the principles and practices of civil engineering as they relate to planning and subdivision design and control.

Ability to accurately apply codes with tact, firmness and impartiality.

Ability to analyze planning issues and to recommend solutions.

Ability to interpret and analyze technical and statistical information and to prepare and present technical oral and written reports.

Ability to maintain files, records and reports.

Ability to communicate effectively in oral and written forms.

Ability to operate a motor vehicle and a variety of office equipment and tools.

Ability to establish and maintain effective working relationships with supervisors, other employees, industry contacts and the general public.

Ability to perform and apply simple mathematical functions (addition, subtraction, multiplication, division) and use a calculator.

Physical Requirements

Must be able to perform basic life operational functions of climbing, balancing, stooping, kneeling, crouching, crawling, reaching, standing, walking, pushing, pulling, lifting, grasping, feeling, and repetitive motion.

Must be able to perform light work that involves walking or standing much of the time and involves exerting up to 20 pounds of force on a recurring basis, or skill, adeptness and speed in the use of fingers, hands or limbs on repetitive operation of mechanical or electronic office or shop machines or tools within moderate tolerances or limits of accuracy.

Most possess normal visual acuity, depth perception and field of vision, hearing and speaking abilities.

Desirable Education and Experience

Graduation from high school or GED equivalent.

Requires considerable experience in building construction and/or inspection, and/or in the enforcement of state and local codes.

Special Requirement

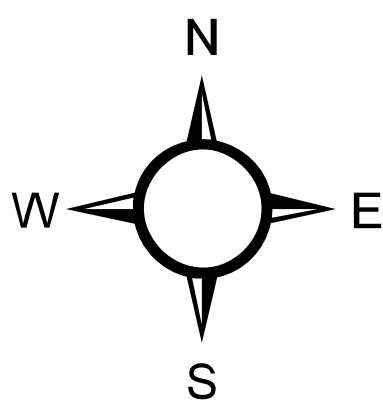
Must possess a valid state driver's license.

Must possess or be able to obtain state certification as a Standard Level 1 Building Inspector in building, plumbing, heating, electrical and fire prevention within two years of employment.

Possession of a commercial contractor's license in one trade area is preferred.

Ability and willingness to obtain Certified Zoning Administrator status from NC Institute of Government within a time frame required by the Town Administrator.

Town of Montreat North Carolina Official Zoning Map, 2016



Official Zoning Map, Town of Montreat, N.C.
Adopted by Town of Montreat
Board of Commissioners November 14, 1985

Amended June 28, 1990
Amended May 14, 1992
Amended August 12, 1993
Amended January 9, 2003
Amended September 8, 2005
Amended September 12, 2013

Mayor

Town Clerk

Legend

Corporate Limits

Mountain Ridge

Ridge Protection Overlay (RPO)

ETJ Extra Territorial Jurisdiction

Montreat Streets

Montreat Parcels

Town Center Overlay

(R-1) Low-Density Residential District

(R-2) Medium-Density Residential

(R-3) *Low-Density Residential

(I) Institutional District

(I/R) Institutional/Residential District

Woodland District

(CD) Conservation_District

*Limited Availability of Town Services
in These Areas

