



Town of Altavista, Virginia
Meeting Agenda
Town Council Work Session
Tuesday, August 25, 2020
5:00 p.m. – Council's Chambers

J.R. "Rudy" Burgess Town Hall
510 7th Street
Altavista, VA 24517

- 1. Call to Order**
- 2. Agenda Adoption**
- 3. Recognitions and Presentations**
- 4. Public Comment (Agenda Items Only)**

*Citizen's wishing to address Council should provide their name and residential address. Citizen's comments are limited to three (3) minutes with a total of fifteen (15) minutes allotted for this purpose. (Please note that the Citizen's Time is **NOT** a question-and- answer session between the public and the Council.)*

5. Items Referred from Previous Meetings

- a. Booker Building Floor Improvements [\(LINK\)](#)**

6. New Items for Discussion/Unfinished Items

- a. Fiscal Policies Update [\(LINK\)](#)**
- b. Avondale Park [\(LINK\)](#)**
 - i. Pavilion and Shade Structure Quotes**
 - ii. Park Naming Consideration**
 - iii. Altavista Enrichment Outreach – Story Book project**
- c. Electric Vehicle Charging Station [\(LINK\)](#)**
- d. Community Development & Housing Analysis Report *(Sharon Williams)* [\(LINK\)](#)**
- e. Finance Items *(Tobie Shelton)* [\(LINK\)](#)**
 - i. FY2020 End of Year Budget Amendments**
 - ii. Delinquent Tax List and Write-offs**
- f. FY2021 Budget Amendment Public Hearing Request [\(LINK\)](#)**
- g. Recreation Committee Report *(Sharon Williams)* [\(LINK\)](#)**
 - i. Trail gravel project**
 - ii. English Park Ash Tree Removal**
 - iii. Parking lot pavement project (CIP)/Bike Turnaround**
- h. Police Vehicle marking request *(Chief Merricks)* [\(LINK\)](#)**

7. Public Comment (Non Agenda Items)

*Citizen's wishing to address Council should provide their name and residential address. Citizen's comments are limited to three (3) minutes with a total of fifteen (15) minutes allotted for this purpose. (Please note that the Citizen's Time is **NOT** a question-and- answer session between the public and the Council.)*

8. Matters from Council

9. Closed Session

Section 2.2-3711 (A)(3) regarding discussion or consideration of the acquisition of real property for a public purpose, or of the disposition of publicly held real property, where discussion in an open meeting would adversely affect the bargaining position or negotiating strategy of the public body.

10. Adjournment

THE TOWN OF ALTAVISTA IS COMMITTED TO FULL COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT STANDARDS. TRANSLATION SERVICES, ASSISTANCE OR ACCOMODATION REQUESTS FROM PERSONS WITH DISABILITIES ARE TO BE REQUESTED NOT LESS THAN THREE (3) WORKING DAYS BEFORE THE DAY OF THE EVENT. PLEASE CALL (434) 369-5001 FOR ASSISTANCE.



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

Items Referred from Previous Meetings

MEETING DATE:

August 25, 2020

ITEM #: 5a**ITEM TITLE:**

Booker Building Floor Improvements

DESCRIPTION:

Staff provided to Town Council, at their July 28th Work Session, information in regard to several proposals received for improvements to the floor of the Booker Building. Previously, Town Council had directed staff to pursue proposals that would be in-line with Option 1 as proposed by Mr. Robert Lee. Mr. Lee previously provided to the Town a list of potential improvements to the Booker Building a copy of said report is attached. [\(LINK\)](#)

The proposals that were submitted provided different solutions and were not easily comparable and Town Council asked that staff provide the proposals to Mr. Lee to evaluate, his response is attached. [\(LINK\)](#) Also attached is a comparison of the different proposals. [\(LINK\)](#) It appears that the choice will be dependent upon Town Council's desire in regard to the finish of the floor. The original proposals that were included in the July 28th Agenda Packet are attached. [\(LINK\)](#)

RECOMMENDATION:

Per discussion of Town Council.

BUDGET/FUNDING:

No funds were included in the FY2021 Budget for this item.

POTENTIAL ACTION:

- Per Council's discussion:
 - Motion to approve a proposal for the floor resurfacing project
 - Defer action and place on a future meeting agenda.
 - Take No Action.

ATTACHMENTS:

- Booker Building Floor Recommendations (Mr. Lee) [\(LINK\)](#)
- Floor proposal review (Mr. Lee) [\(LINK\)](#)
- Booker Building Floor Option Comparison Chart [\(LINK\)](#)
- Floor Quotes [\(LINK\)](#)

MEMO

March 16, 2020

David Garrett
Public Works Director
PO Box 420
Altavista, VA 24517

Re: Booker Building

Dear Mr. Garrett,

I appreciate the opportunity to provide a preliminary budget for some areas of renovation at the Booker Building at English Park in Altavista in order for the Town to set realistic budgets to do the work.

I have based this cost information on the walk through that was done with you on Tuesday March 3, 2020. This budget is in current dollars and does not include any cost for architectural or engineering documents that the Jurisdiction having Authority may require. No permit cost or hazardous removal (asbestos/lead) is included. No roofing is included.

For occupancy of 400 and a review of the Code (Table 2902.1), the bathroom fixture requirement should be acceptable as follows:

Men- 1 HC water closet, 2 urinals, 2 sinks

Women- 1 HC water closet, 2 water closets, 2 sinks

Also requires a Service Sink and a Water Fountain

Please find attached an approximate project cost breakdown.

Please note most of this work can be done by the town or contracted directly by the town to the subcontractors and save cost.

If you have any questions please do not hesitate to contact me.

Thank you,



Robert W. Lee III
434-845-0301

MEMO

Booker Building Floor Options:

- 1) Simple clean and polish of existing concrete floor \$27,445.00
 - a. Polish floor
 - b. Vapor Barrier coat
 - c. Grind and seal existing floor joints
- 2) Simple clean, polish and stain of existing concrete floor \$33,800.00
 - a. Polish floor
 - b. Stain floor (1 color)
 - c. Vapor Barrier coat
 - d. Grind and seal existing floor joints
- 3) Clean floor, apply 1/16" coating of existing concrete floor \$37,976.00
 - a. Clean Floor
 - b. 1/16" topping (1 color)
 - c. Vapor Barrier coat
 - d. Grind and seal existing floor joints
- 4) Clean floor, apply 1/16" coating with chips at existing concrete floor \$47,476.00
 - a. Clean Floor
 - b. 1/16" topping (1 color w/chips)
 - c. Vapor Barrier coat
 - d. Grind and seal existing floor joints

Booker Building Bathroom Renovations \$55,419.00

- Remove existing fixtures and toilet partitions
- Cut flooring for new fixture layout and patch
- Clean, polish and stain flooring with 1 color
- Install new mini split heat pump to heat and cool restrooms
- Install new vanity tops in both restrooms
- Install 2 sinks, 1 HC water closet and 2 urinals in the men's room
- Install 2 sinks, 1 HC water closet and 2 standard water closets in the women's room
- Install new plastic toilet partitions in both bath rooms
- Install new toilet accessories in both bath rooms
- Install a new water cooler to meet code.

Booker Building Exterior Stage \$28,000.00

- Install 103' of a 2'x1' footing
- Install 103' of a 5' tall retaining wall
- Fill the area with approximately 216 tons of stone
- Pour the stage top (585 SF) with 4" of 3500 psi concrete

Booker Building, Altavista VA

Floor Refinishing	Bette Jeanne	Epoxy Systems	Epoxy Systems	Seay Construction	Seay Construction	Seay Construction
Hand Troweled	x			x		
Vapor Barrier				extra		x
Grinding			x	x	x	x
Shot Blast	Required by others					
Crack Repair	x	x				
Leveling	?					
Sealer	x		x	x	x	x
Removal of Toilet Partitions		Required by others	Required by others			
Polish		x				
Dyeing		x	x	x		
Roll on Coating					x	
High solid coating						x
	\$32,184	\$24,575	\$20,766	\$31,625	\$16,485	\$24,450

Summary

What look does the owner want? If to see the carractor of the floor then go with Epoxy systems, if a uniform floor then Seay Construction, unless they requirie the vapor barrier, then Bette Jeanne and add the cost to shot blast.

There is also the question of leveling, does the owner want it or not?

Bette Jeanne is good because of the troweled product, but is incomplete because they do not prep the floor (shot/sand blast). They are not clear on if they include the leveling. Epoxy Systems are only offering to work with the existing concrete, differences, cracks and patches will be visible, this is an owner preference. This is the best deal if the owner wants this look. Seay Construction best offer is for the troweled product for \$31,625. I would have the moisture tested but feel the additional cost for the vapor barrier is outrageous.

Booker Building Floor Refinishing Proposal Review

By: David Garrett & Robert Lee

	Troweled Concrete Overlay	Polished Concrete	Dye & Seal	Troweled Concrete Overlay	Thin-Mil Epoxy Coating	High Solids Epoxy Coating
Floor Refinishing	Bette Jeanne Resurfacing & Decorative Concrete	Epoxy Systems, LLC	Epoxy Systems, LLC	Seay Construction, LLC	Seay Construction, LLC	Seal Construction, LLC
Hand Troweled	√			√		
Vapor Barrier				extra		√
Grinding		√	√	√	√	√
Shot Blast	Not included					
Crack Repair	√	√	√		√	√
Leveling		√	√	√	√	√
Sealer	√	√	√	√	√	√
Removal of Toilet Partition	By Town	By Town	By Town	By Town	By Town	By Town
Polish		√				
Dyeing		√	√	√		
Roll on Coating					√	
High Solid Coating						√
	\$32,184.00	\$24,575.00	\$21,166.00	\$31,625.00	\$16,485.00	\$24,450.00
Summary						
What look does the Town want?						
If you want to see the character of the floor then go with Epoxy systems.						
If you want a uniform floor then go with Seay Construction, unless they require the vapor barrier.						
Bette-Jeanne Resurfacing & Decorative Concrete is good because of the troweled product, but is incomplete because they do not prep the floor(shot/sand blast).						
Epoxy Systems are only offering to work with the exiting concrete, differences, cracks and patches will be visible, this is an owner preference. This is the best deal if the Town wants this look.						
Seay Construction best offer is for the troweled product for \$31,625. I would have the moisture tested but feel the additional cost for the vapor barrier is outrageous. MC-Rapid Vapor Barrier would cost an additional \$16,875.00 if needed.						
Town is in the process of having the floor tested for moisture to see if the MC-Rapid Vapor would be needed.						
The testing equipment will be put into place on Friday, August 1st and will complete the readings on Monday, August 24th.						

Booker Building Floor Resurfacing Proposals

Bette-Jeanne's Resurfacing and Decorative Concrete

Concrete Resurfacing	<u>\$32,184</u>
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(Suggests that surface be sandblasted by others prior to resurfacing)

EPOXY SYTEMS, LLC

Option 1: Polished Concrete	<u>\$24,575</u>
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Option 2: Grind, Dye & seal	<u>\$20,766</u>
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Seay Construction

Option 1: Grind, concrete overlay/sealer	\$31,625
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<i>with MC-Rapid vapor barrier (additional)</i>	<u>\$16,875</u>
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Total with optional vapor barrier	<u>\$48,500</u>
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Option 2: Thin-mil Epoxy Coating (Armorseal 8100)	<u>\$16,485</u>
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Option 3: High Solids Epoxy Coating (General Polymers)	<u>\$24,450</u>
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Bette-Jeanne's Resurfacing and Decorative Concrete

(434) 528-5718 or (434) 944-1012

Virginia Board of Contractors License Number: 2705108616

Proposal of Concrete Resurfacing at the Booker Building

Work to be completed is as follows: The concrete surfaces that include the primary large space with the adjoining restroom areas will be resurfaced with decorative concrete material, using a hand-troweled application with custom marbled earth tone colors, of the customers' choice without a pattern. While a vapor barrier has been requested, our process includes an epoxy resin that serves as a vapor barrier. Current vapor barrier products are used primarily for surfaces other than polished concrete or decorative concrete resurfacing. The work would conclude with a final protective sealer.

The work requested was to include grinding; however, we would suggest this surface needs to be sandblasted, and this would have to be done prior to our resurfacing work. This part of the work is not something we are able to do at this time.

The cracks in the existing concrete, will be repaired and sealed, but cracks in the existing concrete cannot be guaranteed not to return. Variations in colors may occur. The area we discussed with Mr. Garrett near the front entrance will need to be leveled.

The price of \$ 32,184:00 includes all labor and materials which is due in two payments: a down payment of \$ 16,092:00 is due at the start of work. The final payment of \$16,092:00 is due upon completion.

The maintenance of this floor would involve mopping with water and liquid dish soap. No harsh cleaning products or bleach should be applied.

EPOXY SYSTEMS, L.L.C. - WWW.EPOXYSYSTEMS.NET

6507 Old Warwick Road * Richmond, VA 23225 * (804) 378-4686 * (804) 378-4688 Fax

to: **David T. Garrett**
Town of Altavista
Public Works Director
dtgarrett@altavistava.gov

PRICE QUOTATION

BUILDING: BOOKER BUILDING
LOCATION: TOWN OF ALTAVISTA, VIRGINIA
DESCRIPTION OF WORK: DYE & POLISHED CONCRETE/GRIND, DYE & SEAL
OPTION

We will provide labor, materials and equipment to prepare by polishing & dyeing area up to a 800 grit resin with a stanguard and high burnish. All patching & crack repair are included. I also work up a price to Grind, Stain & seal.

Area: 5,000 square feet-no cove base.

Polished Concrete pricing: \$24,575.00 - *OPTION - 1* -
Grind, Dye & seal: \$20,766.00 - *OPTION - 2*

- Pricing includes generator rental or bring ours from Richmond.
- Area clear of all obstacles on floor
- Bathroom partitions need to be removed which we discussed.
- All cracks & spalls to be repaired.

NOTES: No bond included. Pricing includes 1 setup only & weekday work only if applicable.
No caulking included, leveling or pitching.
One year warranty.
Not responsible for substrate failure. Not responsible for stretch marks.
Not responsible for floor flatness specifications unless otherwise noted.
Certified Small Business #666791. Not priced for government wage scale requirements.
This document must serve as an official attachment to all contracts.

Invoice terms:	Net 15	Price is valid for :	60 Days
Time to Complete:	One Week (If a completion estimate is given, it is only an estimate with the work performed under perfect conditions. Any verbal estimates to the contrary do not supersede or force us to work overtime to complete this work to meet your schedule, unless otherwise stated).		
Owner to supply :	480V 3-phase, 50 amp service, multiple 110V electric circuits, lighting (this is a finished hand crafted product), temperature controlled within a range of 55 to 90 degrees F, humidity control below 85% and/or moisture free air for product curing, water, clean & clear area (broom swept prior to our arrival), dust control, trash disposal, and no other trades or persons allowed in the area.		

Date : July 15th 2020

By : Tony Montz _____
Tony.montz@epoxysystems.net

Customer Acceptance: _____ Date: _____

AMERIPOLISH®

SURELOCK



GOLD	RAW SIENNA	CARAMEL	SAND
TERRA COTTA	MAHOGANY	SADDLE BROWN	CHOCOLATE BROWN
WALNUT	BURNT SIENNA	CHESTNUT	RED
MAROON	SEPIA	EGGPLANT	TURQUOISE
SLATE BLUE	PATRIOT BLUE	GREEN	PINE GREEN
FOREST GREEN	GRAY	BLACK	MIDNIGHT BLACK



SureLock Dye can be used with Ameripolish 3D HS Densifier, Ameripolish SR2 Stain Resistor, and Ameripolish 3D SP Stain Protector.

These color samples are only a representation of the Ameripolish Dye colors. Change in concrete slab colors will affect the appearance of the dye. Color results cannot be guaranteed. Actual colors may vary.

info@ameripolish.com ♦ Toll Free: 1.800.592.9320 ♦ www.ameripolish.com



Troweled Concrete Overlay

The price to install troweled concrete overlay in the Booker Building would be **\$31,625**.

Scope of work:

- Grind the concrete to prep it for the overlay
- Apply Ardex P51 Bonding Primer
- Trowel 2 coats of Ardex SD-M concrete overlay
- Apply Increte Systems Vibra-stain
- Apply clear commercial grade epoxy sealer
- Apply clear high traffic urethane

Here is a link to our website that shows you what a troweled overlay looks like. There is also a video on the page that shows the entire Ardex SD-M process. <https://www.decorativeconcreteofvirginia.com/troweled-concrete-overlays>

It is possible that there is moisture vapor transmission happening in the old concrete. It is unlikely that the concrete has a vapor barrier under it, so this can allow moisture to move through the concrete and evaporate when it reaches the surface. We can test to see if moisture vapor is present in the slab. If it is, then we would recommend using the Ardex MC-Rapid vapor barrier prior to installing the overlay.

Instead of the P51 primer mentioned above, we would substitute it for MC-Rapid with a full sand broadcast. The MC-Rapid would lock the moisture down, and the sand would give the floor texture for the overlay to bond to.

The MC-Rapid vapor barrier would cost an additional **\$16,875**.



Thin-mil Epoxy Coating - Armorseal 8100

I also wanted to submit a more budget friendly option than a troweled concrete overlay.

The cost to install the Armorseal 8100 system would be \$16,485. This price includes the following

- Grind the concrete to prep it for epoxy
- Apply 2 coats of Armorseal 8100

Here is a link to the Armorseal 8100 tech data page:

<https://www.paintdocs.com/docs/webPDF.jsp?SITEID=SWPROTECT&doctype=PDS&lang=E&prodno=B70A08100>

This is a breathable thin-mil coating that would be a solid color. This would coat the entire floor with the same color, but you would be able to see any patchwork through the coating.

High Solids Epoxy Coating - General Polymers

This system is thicker than the Armorseal coating, and would leave a high gloss solid color across the entire floor.

The cost to install a high solids epoxy coating would be \$24,450. This price includes the following:

- Grind the concrete to prep for epoxy
- Apply a coat of General Polymers Amperseal vapor barrier
- Apply a coat of General Polymers 3746 high solids epoxy
- Apply a coat of Armorseal Rexthane urethane.

You can see some of our solid colored floor systems here:

<http://www.decorativeconcreteofvirginia.com/industrial-epoxy-urethane-floors>



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Items/Unfinished Items

MEETING DATE:

August 25, 2020

ITEM #: 6a**ITEM TITLE:**

Fiscal Policies Update

DESCRIPTION:

Staff previously provided to Town Council a copy of draft “Fiscal Policies” for review. Tonight, the town’s financial consultant, Davenport, will be available to review/discuss the draft policies and answer Council’s questions. The draft policies would provide guidance and direction to Town Council; as well as to staff in regard to fiscal matters. The draft Fiscal Policies are attached. [\(LINK\)](#)

RECOMMENDATION:

Per discussion of Town Council.

BUDGET/FUNDING:

N/A

POTENTIAL ACTION:

- Per Council’s discussion:
 - Motion to approve the draft Fiscal Policies as presented or modified.
 - Provide staff input as to any items Council would like to see addressed/researched.
 - Defer action and place on a future meeting agenda.
 - Take No Action.

ATTACHMENTS:

- Fiscal Policies (draft) [\(LINK\)](#)

Key: *Italics*: Current practices RED text: New Yellow Highlight: Existing Policy

Policy A – Fund Balance

General Fund

Undesignated Fund Balance

- *The Town of Altavista's Unassigned General Fund Balance will be maintained at a level to provide the Town with sufficient working capital and a comfortable margin of safety to address emergencies and unexpected declines in revenue without borrowing.*
- *The Town shall not use the Undesignated General Fund Balance to finance recurring operating expenses.*
- *The Town will maintain an Undesignated General Fund Balance (UGFB) equal to 100% of General Fund Annual Recurring Revenues (based on previous year's Financial Report). In the event the UGFB is used to provide for temporary funding of unforeseen emergency needs, the Town shall restore the Undesignated General Fund Balance to the minimum of 100% within three years.*
- *Funds in excess of the targeted 100% fund balance may be considered to supplement "pay-as-you-go" capital outlay expenditures, other non-recurring expenditures or as additions to fund balance.*

Committed Fund Balance

- *Committed fund balance includes amounts that can only be used for specific purposes pursuant to constraints imposed by formal action of Town Council. These committed fund balance amounts cannot be used for any other purpose unless Town Council removes or changes the specified use by taking the same action (ordinance or resolution) it employed to previously commit those amounts. Committed fund balance also includes contractual obligations to the extent that existing resources in the fund have been specifically committed to use in satisfying those contractual requirements.*

Assigned Fund Balance

- *Assigned fund balance includes amounts that are constrained by the government's intent to be used for specific purposes but are neither restricted nor committed. Fund Balance may be assigned either through the encumbrance process as a result of normal purchasing activity (which includes the issuance of a purchase order), or by the Town Manager or his designee, in accordance with Council adopted fund balance policy.*

Restricted Fund Balance

- *Restricted fund balance includes amounts that have constraints placed on their use by external sources such as creditors, grantors, contributors, laws or regulations of other governments or imposed by law through constitutional provisions or enabling legislation.*

Non-Spendable Fund Balance

- *Non-spendable fund balance includes amounts that cannot be spent because they are either not in spendable form such as inventories and prepaids or they are legally or contractually required to be maintained intact.*

Policy on the order of spending resources

- The Town considers restricted fund balance to be spent when an expenditure is incurred for purposes for which restricted and unrestricted fund balances are available unless prohibited by legal documents or contracts. When an expenditure is incurred for purposes for which committed, assigned or unassigned amounts are available, the Town considers committed fund balance to be spent first, then assigned fund balance, and lastly unassigned fund balance.

Enterprise Funds***Utility Fund (Water & Sewer)***

- The Town of Altavista will maintain minimum unrestricted cash balances in the Utility (Water & Sewer) Fund equal to 50% of total water and sewer fund expenditures (based on previous year's Financial Report). In the event the minimum unrestricted fund balance falls below the 50% minimum of operating expenses, the Town Council shall approve and adopt a plan to restore this balance to the target level within three years.
- Unrestricted cash may be maintained at a level higher than this minimum to save for transfer to the Utility (Water & Sewer) Capital Fund for large planned expenses (i.e. capital projects), emergencies, cash flow issues related to timing of revenue receipts, and to address economic volatility.
- The purpose of establishing minimum unrestricted cash balance level is to maintain a prudent level of financial resources to protect against the need to raise fees (outside of normal rate increases) due to temporary revenue shortfalls or unpredicted one-time expenses.
- Funds in excess of the targeted 100% fund balance may be considered to supplement "pay-as-you-go" capital outlay expenditures, other non-recurring expenditures or as additions to fund balance.
- A rate review will be conducted at least every two years.

Policy B - Budget

The Town of Altavista encourages the public's input and participation in the budgetary process.

The budget process will be designed in a way that will provide Town Council an opportunity to coordinate major policy issues are identified several months before consideration of budget approval.

Policies

- Town Council shall adopt a balanced budget in accordance with all legal requirements.*
- A structured budget preparation and formulation process shall be used for all departments and agencies receiving funding from the Town.*
- Departmental budgets shall be managed within the total appropriated budget for each fiscal year.*
- All operating budget appropriations shall lapse at the end of the fiscal year to the extent that they are not expended or encumbered.*
- The budget shall be adopted by the affirmative majority vote of Town Council.*
- The Vision and priorities established by Town Council as well as the Comprehensive Plan shall serve as the framework for the budget proposed by the Town Manager.*

G. The fiscal year for the Town is July 1 through June 30 as defined by the *Town Code*, section 2-161.

H. One-time revenues shall be used for one-time expenditures only.

Process

- The Town Manager shall annually prepare a Proposed Budget for Town Council's review. The Proposed Budget shall serve as a financial plan for the upcoming fiscal year and shall contain the following information:
 - A. A budget message that outlines the proposed revenue and expenditures for the upcoming fiscal year together with an explanation of any major changes from the previous fiscal year. The budget message should also include any proposals for major changes in financial policy.
 - B. Charts indicating the major revenues and expenditures in each major fund (General, Enterprise (Utility), and Highway Maintenance) as well as changes in fund balance for all funds.
 - C. Summaries of proposed expenditures by function, department and activity for all funds proposed to be expended in a fiscal year.
 - D. A schedule of estimated requirements for the principal and interest of each bond issue.
 - E. A three-year history of revenues and expenditures to include the prior year actual, current year adopted, revised and proposed budget for each major fund.
 - F. The proposed budget appropriation resolution, including the tax levy.
- The Town Council shall hold a public hearing on the budget submitted by the Town Manager and all interested citizens shall be given an opportunity to be heard on issues related to the proposed budget, including the Capital Improvement Plan.
- Following the public hearing on the Proposed Budget, Town Council may make adjustments. In instances where Town Council increases the total proposed expenditures, it shall also identify a source of funding at least equal to the proposed expenditures.

Capital Improvement Program (CIP)

- A five year Capital Improvement Program (CIP) that serves as the basis for annual capital appropriations and debt financing requirements shall be prepared and updated annually.
- The CIP shall include descriptions, timeline, cost estimates, and a schedule of expected expenditures for each project.
- Debt service requirements and funding needs for Town government shall be determined based on the Adopted CIP.
- Long-term borrowing shall be confined to major capital improvement and equipment purchases.
- Short-term borrowing shall be limited to bond anticipation notes and equipment leasing, where feasible, with a life of less than 8 years.
- Capital project appropriations shall lapse upon project completion, allowing for an adequate warranty period. Lapsed appropriations shall remain in the Capital Fund for reallocation to other projects.
- Incremental operating costs associated with capital projects shall be funded in the operating budget after being identified and approved in the Capital Improvement Program.
- Pay-as-you-go funding, including State Highway Maintenance Funds, State Revenue Sharing Funds, State and federal grants, and other cash sources, shall not be less than 10%, with a goal of 15%, of the Town's 5-Year CIP.

Monthly Financial Reporting

The Town Council will be provided with monthly Revenue/Expenditure reports as part of their monthly Council Meeting Agenda packet.

Third Quarter Review

In March, staff will evaluate all expenditures and revenue as compared to budget and make recommendations to Town Council regarding possible budget adjustments. Section 15.2-2507 of the Code of Virginia requires that a public hearing be held prior to Town Council action when proposed amendment of the budget exceeds one percent of the total expenditures shown in the currently adopted budget.

First Quarter Review

In September, staff will evaluate requests for the carry forward of funds remaining from prior year appropriations and other possible budget adjustments. Section 15.2-2507 of the Code of Virginia requires a public hearing be held prior to Town Council action when a proposed budget amendment exceeds one percent of the total expenditures shown in the currently adopted budget.

POLICY C – Investments**I: Purpose**

It is the policy of the Town of Altavista, Virginia (“the Town”) that the investment and administration of its funds be made in accordance with the Code of Virginia Investment of Public Funds Act, the applicable provisions of any outstanding bond indebtedness, and this policy. The Town shall be in complete compliance with all applicable federal, state and local laws, and other regulations and statutes governing the investment of public funds. Within those parameters, the goal of this policy is to achieve the highest rate of return that is reasonable. This policy will be reviewed on an annual basis. Any changes must be approved by the Town Council.

II: Scope

This investment policy applies to all cash and financial investments of various funds of the Town as identified in the Town’s Comprehensive Annual Financial Report, with the exception of those financial assets explicitly excluded from coverage for legal or operational reasons. Bond proceeds shall be invested in accordance with any requirements and restrictions outlined in the bond documents. This policy will apply to any newly created funds unless specifically exempted.

Pooling of funds - Except for cash in certain restricted and special funds, the Town will consolidate cash balances from all funds to maximize investment earnings. Investment income will be distributed to the various funds in accordance with Town budgetary guidelines.

III: Objectives

Funds shall be invested in only those investments permitted by Federal, State and local laws as it relates to public funds, as well as any contractual agreements entered into by the Town.

All of the Town’s funds, regardless of term, shall be invested with the following objectives listed in the order of priority:

1. *Safety* - Investments shall be undertaken in a manner that seeks to ensure the preservation of capital in the portfolio. Specifically, the Town will:
 - a. seek to avoid realizing any loss through the sale or disposal of an investment; and
 - b. seek to mitigate the risk of unrealized losses due to a decline in value of investments held in the portfolio.
2. *Liquidity* - The investment portfolio shall remain sufficiently liquid to meet all cash requirements that may be reasonably anticipated. This shall be accomplished by structuring the portfolio in the following manner:
 - a. The Town will purchase investments scheduled to mature in accordance with its anticipated cash needs, in order to minimize the need to sell investments prior to maturity.
 - b. A portion of Town Funds will be maintained in cash equivalents, including money market funds, investment pools and overnight securities, which may be easily liquidated without a loss of principal should an unexpected need for cash arise; and
 - c. The portfolio will consist largely of investments with active secondary markets.
3. *Yield* - The Town's investment portfolio shall be designed with the objective of maximizing a fair rate of return consistent with the investment risk constraints and cash flow characteristics of the portfolio. The Investment Official shall establish suitable benchmarks for the measurement of the portfolio's return.

IV: Delegation of Authority

Authority to manage the Town's investment program is derived from the Code of Virginia. The Finance Director (the Investment Official) is responsible for investment decisions and activities in accordance with established written procedures and internal controls as well as operation of the investment program consistent with this investment policy, under the direction and control of the Town Manager.

Subject to the approval of the Town Council, the Finance Director may employ financial consultants on a contractual basis to assist in the development and implementation of investment procedures and policies, to monitor the effectiveness and continued compliance with such policies and procedures, and to provide guidance in investment matters.

V. Standards of Care

The standard of prudence to be used by investment personnel shall be the "prudent person" standard and shall be applied in the context of managing an overall portfolio. The "prudent person" standard states:

"Investments shall be made with judgment and care – under circumstances then prevailing - which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probably income to be derived."

The Finance Director, and those delegated investment authority under this Policy, when acting in accordance with written procedures and this Investment Policy and exercising due diligence, shall be relieved of personal responsibility for an individual's credit risk or market price changes, provided deviations from expectations are reported in a timely manner and appropriate action is taken to control adverse developments.

VI: Ethics and Conflict of Interest

Staff involved in the investment process shall refrain from personal business activity that could conflict with the proper execution and management of the investment program, or that could impair their ability to make impartial investment decisions. Employees and investment officials shall disclose to the Town Manager any material interest in financial institutions that conduct business with the Town and shall further disclose any large personal financial/investment positions that could be related to performance of the Town's portfolio. Staff involved in the investment process shall refrain from undertaking personal investment transactions with the same individual with whom business is conducted on behalf of the Town.

VII: Internal Controls

The Finance Director is responsible for establishing and maintaining an internal control structure designed to provide reasonable assurance that the assets of the Town are protected from loss, theft, or misuse. An annual independent review shall be conducted by an external auditor to assure compliance with policies and procedures.

The internal controls shall address the following:

- *Controls to prevent collusion.*
- *Separation of transaction authority from accounting and reconciliation activities*
- *Custodial safekeeping*
- *Written confirmation of transactions for investment and wire transfers*

Clear delegation of authority to subordinate staff members, when necessary.

VIII: Authorized Investments

Authorized investments for public funds are limited to those set forth in the Investment Public Funds Act of the Code of Virginia §§ 2.2-4500 through 2.2-4518. Within this permitted statutory framework, the Town limits the investments of assets to the following categories of securities:

- Obligations of the Commonwealth of Virginia - Stocks, bonds, notes, and other evidences of indebtedness of the Commonwealth and those unconditionally guaranteed as to the payment of principal and interest by the Commonwealth.
- Obligations of the United States – Stocks, bonds, notes, and other obligations issued or guaranteed by the U.S. Government, an agency thereof, or U.S. Government Sponsored Enterprises (GSEs). These securities can be held directly, or in the form of repurchase agreements collateralized by such debt securities, or in the form of a registered money market or mutual fund provided that the portfolio of the fund is limited to such evidences of indebtedness.
- Certificates of deposit and time deposits of Virginia banks and savings institutions - Such instruments must be federally insured to the maximum extent possible and collateralized under the Virginia Security for Public Deposits Act, §§2.2-4400 through 2.2-4411 of the Code of Virginia.

- Repurchase Agreements - Overnight, term or open Repurchase agreements collateralized by U.S. Treasury/Agency Securities. The collateral for overnight or one day repurchase agreements is required to be at least 100% of the value of the repurchase agreement.
- Commercial Paper - Pursuant to § 2.2-4502 of the Code of Virginia, the Town is authorized to invest in commercial paper. Any such investment shall be of “prime quality” with a rating no lower than P-1 by Moody’s and A-1 by Standard and Poor’s, with a maturity of 270 days or less, issued by domestic corporation.
- Commonwealth of Virginia Local Government Investment Pool (LGIP) - This is a special purpose state-administered investment pool offered to public entities for the investment of public funds under the Local Government Investment Pool Act of the Code of Virginia. It is managed by the Investment Division of the Virginia Department of Treasury and its investments are made in accordance with the Investment of Public Funds Act of the Code of Virginia. It is managed similar to a money market fund with objectives of providing safety, liquidity, and return. Funds may be withdrawn on a daily basis.
- VACo/VML Virginia Investment Pool Trust Fund (VIP) - This is a Section 115 governmental trust fund created under the Joint Exercise of Powers Act of the Commonwealth of Virginia. The Cities of Chesapeake and Roanoke each passed an ordinance in 2013 to create the VIP Trust Fund. On September 13, 2013, a trust fund agreement was adopted by a Board of Trustees, the governing body of the VIP Trust Fund. The Board of Trustees is comprised of 12 local government treasurers and chief investment officers, plus two ex officio non-voting members consisting of executive directors of the Virginia Municipal League and the Virginia Association of Counties. The VIP portfolio is a fixed income pooled investment portfolio that invests in assets of government and high-quality corporate securities (defined as having at least AA ratings by Standard & Poor’s and Moody’s) with an average duration of between one and two years. The Investment Pool may invest in the broad range of investments authorized by the Virginia Investment of Public Funds Act (Code of Virginia, 2.2-4500 through 2.2-4519). The maximum maturity of a security in the portfolio will be no more than five years. The portfolio’s benchmark is the Bank of America Merrill Lynch 1 – 3 Year Corporate/Government Index. The objective of the portfolio is to outperform the benchmark over three-year periods and to preserve capital.

No additional funds shall be invested in any investment that is listed on the Moody’s Watchlist, Standard & Poor’s CreditWatch, or Fitch Watch with a short term negative rating.

IX: Investment Diversification

The Town of Altavista shall diversify its investments within the permitted statutory framework of the “Investment of Public Funds Act” subject to the following limits: The portfolio will be diversified with no more than five percent of its value invested in the securities of any single issuer. This limitation shall not apply to securities of the Commonwealth of Virginia, the U.S. Government, insured certificates of deposit, the LGIP or the VIP.

The maximum percentage of the portfolio permitted in each eligible security type is as follows:

Commonwealth of Virginia Securities	50%
U.S. Government Securities	50%
Certificates of Deposit	75%
Repurchase Agreements	50%

Commercial Paper	25%
Virginia LGIP	100%
VACo/VML VIP	75%

X: Reporting Requirements

Periodic reporting of portfolio position and investment performance results will add an element of accountability and discipline to the Town's investment program.

The Finance Director shall prepare an accounting of investment activity to be included in the monthly Council financial report. The report will include details of the portfolio's position at month end and will include current yield, investment income, and comparisons to prior years and to current budget projections.

Policy D – Internal Controls**I: Purpose**

This policy establishes guidelines for a system of internal controls to safeguard the Town's assets against loss, to promote the accuracy and reliability of its accounting data, to promote operational efficiency and to encourage adherence to rules and regulations.

II: Scope

This policy applies to all Town departments.

III: Policy

System of Internal Controls - a system of internal controls is designed to provide reasonable assurance that the following have been met:

1. Safeguard Assets

Assets include all property of the Town. Examples include buildings, equipment, accounts receivable and cash (including checks payable to the Town).

Extreme care must be exercised in safeguarding cash and items that are easily convertible to cash, such as accounts receivable. Appropriate procedural safeguards must be in place to protect such items. Accordingly, employees who receive and deposit payments on account must not also have the ability to modify the amounts in the accounts receivable records.

Appropriate physical safeguards must also be in place to secure assets. Cash should be locked in a secured facility to deter theft.

2. Verify the accuracy and reliability of financial data

On a monthly basis, each department of the Town receives a detailed revenue and expenditure summary of accounts and projects under their purview. It is the responsibility of the department to review the summaries for accuracy and contact the Finance Director to resolve any discrepancies in a timely manner.

The reliability of information contained in the Town's general ledger is dependent upon the accurate recording of transactions. All departments are responsible for forwarding invoices, receipts, personnel and payroll actions, travel expense reimbursements and any other type of financial transaction to the Finance Department in a timely manner to ensure these transactions are recorded in the system.

Financial reports are presented to Town Council each month.

3. Safeguard personal financial information

The Town will take all reasonable measure to safeguard protected personally identifiable information and any other information identified as a result of a Federal award as sensitive. In addition, the Town will observe all state and local laws regarding privacy and confidentiality.

4. Promote operational efficiency

Operational efficiency is conditioned upon a proper organizational plan coupled with sufficient training of employees. Organizational plans must be designed to ensure proper segregation of duties such that no one employee controls all phases of a transaction. The Town commits to maintaining an effective organizational structure, to the best of its abilities. It is the responsibility of each department to ensure adequate training based on the specific requirements of each position.

5. Compliance with all applicable laws and regulations

It is the policy of the Town to comply with all applicable laws, regulations, conditions of grants, debt covenants, and all other types of external restrictions that may be a condition of funding, provided that the Town Council acknowledged and accepted such conditions or restrictions.

Policy E – Capital Assets

I: Purpose

The purpose of this policy is to provide general guidance for the proper recording and financial reporting of capital assets. The Town's capital assets primarily take the form of infrastructure, buildings and improvements, vehicles and equipment. Investment in these assets assists the government in providing for the quality of life of its citizenry, promotes economic development, and bolsters the credit worthiness of the Town.

II: Scope

This policy applies to all Town of Altavista departments.

III: Definitions

Amortization - the systematic allocation of the cost of an intangible asset over its useful life.

Capital Asset - Land, improvements to land, easements, buildings, building improvements, vehicles, machinery, equipment, works of art and historical treasures, infrastructure, and all other tangible and intangible assets that are used in the operations and have initial useful lives extending beyond a single reporting period.

Capital Outlay - The acquisition of tangible personal property items including, but not limited to, furniture, equipment, and vehicles that meet the definition of a capital asset.

Capital Project - The acquisition or construction of major capital equipment or facilities that are typically accounted for in a separate capital project fund.

Capitalization Threshold - The dollar value at which the government elects to capitalize tangible or intangible assets.

Capitalized Costs - The cost of an asset and any other expenditures necessary to place the asset into service.

Depreciation - The systematic allocation of the initial acquisition cost of a tangible asset over its useful life.

Impairment - A significant, unexpected decline in the service utility of an capital asset.

Intangible asset - A nonfinancial asset that lacks physical substance, has an initial useful life that extends beyond a single reporting period, and provides present service capacity. Examples include:

Easements - Interest in land owned by another entity that entitles its holder to the right to use the land for a specific purpose.

Software licenses - The right to use one or more copies of software or an application without violating copyrights.

Internally Generated Intangible Capital Assets - Intangible assets that are either 1) created or produced by the government itself or by an entity contracted by the government; and 2) acquired from a third party, but requires more than minimal incremental effort on the part of the government to begin to achieve the expected level of service capacity.

Operating Costs - Expenditures for goods or services that do not meet the threshold established for capitalization. These costs include expenditures for maintenance and repairs that do not appreciably add to the value of the asset or materially extend the useful life of the asset.

Present Service Capacity - An asset's existing capability to enable the government to provide services, which in turn enables the government to fulfill its mission.

Proffered Assets - Tangible assets (or cash) offered by donation by property owners at the time of a rezoning to help defray the cost of capital facilities associated with the development of the property.

Service Utility - The ability of an asset to provide its intended service to the organization.

Useful Life - The estimated period of which a capital asset provides service.

IV: Policy

A. Internal Controls

All Town departments shall establish and maintain internal controls over capital assets to provide reasonable assurance of accountability, timely and accurate financial reporting, and compliance with any applicable laws and regulations. Internal controls should ensure the following:

1. Capital assets are adequately safeguarded from loss or theft.
2. Proper approvals are followed for acquisitions and dispositions.
3. Physical inventory is taken annually and reported to Finance Department.
4. A proper segregation of duties is in place with regard to assets.

B. Accounting and Reporting for Capital Assets and Projects

1. *Funding sources: Capital assets and projects may be funded by local, state and/or Federal revenue, acquired through donation, trade transaction, or purchased with proceeds from a debt transaction or capital lease.*

Assets acquired with state and Federal funding will be tracked regardless of capitalization thresholds to ensure compliance with Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, specifically:

- a. *Title of real property and equipment acquired or improved with Federal awards will vest with the Town. Title for federally-owned and exempt property remains vested with the Federal government.*
 - b. *Insurance coverage for real property and equipment acquired with Federal funds must be at a minimum equivalent to that of other property owned by the Town.*
 - c. *Real property will be used for the originally authorized purposes as long as needed.*
 - d. *Instructions for disposition of real property must be obtained from the Federal awarding or pass-through agency.*
2. *Capital assets will be budgeted and accounted for in the appropriated operating fund using a capital outlay object code (80 series). Capital projects, except those related to proprietary activities, shall be budgeted and accounted for in the Capital Improvement Program (CIP).*

C. Valuation of Capital Assets

1. *Acquired by purchase - Capital assets purchased by the Town shall be reported at historical cost. The cost of a capital asset should include ancillary charges necessary to place the asset into its intended location and condition for use. Items to be included in the cost of a capital asset are:*
 - a. *Original contract or invoice price*
 - b. *Freight and transportation charges*
 - c. *Import duties*

- d. Handling and storage charges
- e. In-transit insurance charges
- f. Installation charges
- g. Charges for testing and preparation of use
- h. Charges for refurbishing used items when purchased
- i. Parts and labor associated with the construction of equipment
- j. Site preparation costs
- k. Professional fees

Extended warranties, training, and maintenance agreements, which can be separately identified from the cost of the related asset, shall not be capitalized.

2. *Acquired by donation or trade transaction - Assets acquired by donation or trade transaction shall be recorded at the fair market value on the date of the transaction. If the fair market value of an item already in service is unavailable at the time of capitalization, then the current estimated replacement cost shall be used. Both fair market value and current estimated replacement costs are subject to the capitalization thresholds detailed in this section.*

D. Valuation of Capital Projects

1. Only costs directly identified with the project may be capitalized. Costs incurred for capital projects are classified into four stages:
 - a. Preliminary - this phase involves the exploration of opportunities for acquisition or construction.
 - b. Pre-Acquisition/Construction - the acquisition or construction of the asset is probable.
 - c. Acquisition/Construction - the item has been acquired and/or construction has commenced.
 - d. In Service - the asset is substantially completed and/or has been placed in service.

The following table illustrates typical activities associated with each phase and indicates the accounting treatment to be applied to related costs:

Stage	Typical Activities	Treatment
Preliminary	<ul style="list-style-type: none"> • Feasibility studies • Scope development • Preliminary estimates • Utilities analysis • Consideration of alternatives 	Expense
Pre-acquisition/ Construction	<ul style="list-style-type: none"> • Architectural and engineering work • Legal expenses • Closing and titling • Appraisal fees • Surveying • Site preparation/demolition • Soil testing • Vendor selection 	Capitalize

	<ul style="list-style-type: none"> • Planning and design • Scope of definitions 	
Acquisition/ Construction	<ul style="list-style-type: none"> • Project management • Construction • Utility expansion • Insurance premiums during construction • Initial furnishing and fixtures 	Capitalize
In Service	<ul style="list-style-type: none"> • Maintenance and repairs • Upgrades • Improvements 	<p><u>Expense</u> – maintenance and repairs are typically expensed if they do not increase the useful life of the asset.</p> <p><u>Capitalize</u> – additional components, upgrades and renovations that increase the useful life and/or service capacity of asset</p>

E. Thresholds for Capitalization

The following table provides guidelines for capitalization of various categories of assets (note that all assets must have a useful life greater than one reporting period):

Asset Category	Useful Life	Threshold
Tangible Assets	Greater than a single reporting period	\$5,000 and greater per individual asset
Intangible assets – software licenses and applications	Greater than a single reporting period	\$10,000 and greater per program/application or for licenses purchased en masse.
Intangible assets – easements	Greater than a single reporting period	\$20,000 and greater per easement
Capital projects	Greater than 5 years	\$50,000 and greater

Asset costs below the established thresholds will be recognized as operating expenses of the reporting period.

F. Estimated Useful Life and Methods of Depreciation and Amortization

The estimated useful life of an asset is the period during which that asset provides service. The following factors may assist in determining the useful life on an asset:

1. Quality – similar assets may differ substantially in quality because of differences in materials, design and workmanship
2. Application – the useful life of a given type of capital asset may vary significantly depending upon its intended use
3. Environment – environmental conditions may have an impact on the useful life of an asset.

Estimates of useful life are required for all asset classes except land, intangible assets that have indefinite useful lives, works of art, historical treasures, and similar assets that are exempt from capitalization. Land use rights acquired in a transaction that did not involve the underlying property should be reported as intangible assets.

Industry guidelines are used to estimate the useful lives of capital assets. Any extended life resulting from a major change in the asset must be specified at the time of the change. Upgrades and renovations must add to the useful life of the original asset, if they are to be capitalized as part of a larger asset.

The following ranges are provided for each asset class:

Asset Class	Years
Buildings and improvements	50
Utility plant in service	50
Infrastructure	30 – 50
Furniture, equipment and vehicles	5 – 10
Intangible assets	3 - 5

Depreciation and amortization are calculated and recorded annually to allocate the expense associated with the acquisition of an asset over its estimated useful life, except for assets that have an indefinite useful life. Depreciation is calculated using the straight-line method.

G. Asset Impairment

A capital asset is considered impaired when its useful life and/or service utility had declined significantly and unexpectedly. Impairment is often due to one of the following events or changes in circumstances:

1. Physical damage where action would be needed to restore lost service utility
2. Changes in laws, regulations, or other environmental factors that negatively affect service delivery
3. Technological developments that negatively affect service utility or evidence of obsolescence
4. A change in the manner or duration of use of a capital asset that negatively affects its service utility
5. Stoppage of construction

Note that a temporary decline in service utility does not constitute impairment. The definition of impairment requires that the change in service utility be both significant and unexpected. Upon determination that an asset is impaired, the responsible department should provide an estimate of the percentage of lost service utility to the Finance Department so that a corresponding reduction in the asset's book value may be recorded.

Policy F – Purchasing

I: Purpose

The purpose of this policy is to provide a manageable and efficient set of guidelines for purchasing goods and services for the Town, while ensuring competition and complying with requirements set forth in the Virginia Public Procurement Act.

II: Scope

This policy applies to all Town Departments.

III: Policy

A. Purchasing Principles

i. Code of Conduct

No elected official or employee of the Town of Altavista, or any member of his or her immediate family shall have any pecuniary interest, either directly or indirectly, in any contract, purchase or purchase order for any supplies, materials, equipment or contractual services used by or furnished to the Town. Nor shall such officials or employees accept or receive, directly or indirectly, from any person or firms to which any contract or purchase order may be awarded, or from whom or which any purchase is made, by rebate, gift, or otherwise, any money or anything of value whatsoever, or any promise, obligation for future reward or compensation. Violation by a supplier shall result in disbarment from future Town purchasing activities. Employee conduct is further detailed in Chapter 12 of the Town's Personnel Policies Manual (August 2018).

Proprietary information from competing vendors shall not be disclosed to the public or to competitors.

ii: Ethics in Public Procurement

For clarification, refer to the Code of Virginia, Chapter 7, Virginia Public Procurement Act, Article 4, Ethics in Public Contracting. Per Code of Virginia § 2.2-4343 – 9, “any town with a population of less than 3,500, except as stipulated in the provisions of §§ 2.2-4305, 2.2-4308, 2.2-4315, 2.2-4311, 2.2-4330, 2.2-4333 through 2.2-4338, 2.2-4343.1, and 2.2-4367 through 2.2-4377.”

iii: Quality vs. Quantity

Quality means suitability. It does not necessarily have to be the best or highest quality, but rather the correct quality for the purpose intended. Quality is not measured by price only. It may be determined by analysis, physical test, measurements, and performance. To secure proper quality, specifications must be developed in cooperation with the using department so that the vendor understands exactly what is desired.

iv: Competition

All purchasing transactions, regardless of whether by formal advertising or by negotiation and without regard to dollar value, shall be conducted in a manner that provides maximum

open and free competition and which avoids placing unreasonable requirements on qualified vendors. In order to insure objective vendor performance and eliminate unfair competitive advantage, a vendor who or which develops or drafts specifications or a request for proposal for a particular purchase may be excluded from competing and supplying the item or service.

v: *Specifications*

Solicitations of offers, whether by formal advertising or negotiations, shall incorporate a clear and accurate description of the technical requirements for the material, product, or services to be purchased. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equal" description may be used as a means to define the performance or other salient requirements of a procurement.

vi: *Documentation*

The thorough documentation of purchasing activities requires special emphasis in public purchasing due to the nature of most transactions and of the imposition of controls to protect the public interest. Central to the Town's public purchasing regulations is the requirement that purchases in excess of \$5,000 be supported by written documents evidencing that all purchasing regulations have been complied with, or if not, what circumstances justified non-compliance.

vii: *Delegation*

The Town Manager may delegate the procurement of any goods and services to the Purchasing Agent or other responsible official under the jurisdiction of the Purchasing Agent.

viii: *Public Access to Procurement Information*

Except as provided below, all proceedings, records, contracts and other public records relating to procurement transactions shall be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act.

- a. Cost estimates relating to a proposed procurement transaction prepared by or or a public body shall be open to public inspection.*
- b. Any competitive sealed bidding bidder, upon request, shall be afforded the opportunity to inspect bid records within a reasonable time after the opening of all bids but prior to award, except in the event that the Town Manager decides not to accept any of the bids and to reopen the contract. Otherwise, bid records shall be open to public inspection only after award of the contract.*
- c. Any competitive negotiation offeror, upon request, shall be afforded the opportunity to inspect proposal records within a reasonable time after the evaluation and negotiations of proposals are completed but prior to award, except in the event that the Town Manager decides not to accept any of the proposals and to reopen he contract. Otherwise, proposal records shall be open to the public inspection only after award of the contract.*

- d. *Any inspection of procurement transaction records under this section shall be subject to reasonable restrictions to ensure the security and integrity of the records.*
- e. *Trade secrets or proprietary information submitted by the bidder, offeror or contractor in connection with a procurement transaction or pre-qualified application submitted pursuant to subsection B of §11-46, Code of Virginia, shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the bidder, offeror or contractor must invoke the protections of this section prior to or upon submission of the data or other materials, and must identify the data or other materials to be protected and state the reasons why protection is necessary.*

ix: Employment Discrimination by Contractors Prohibited/Drug Free Workplace

Every contract over \$10,000 shall include the following provisions:

1. During the performance of this contract, the contractor agrees as follows:
 - i. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, such notices of nondiscrimination.
 - ii. The contractor, in all solicitation or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
 - iii. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
2. The contractor will include the provisions of the foregoing paragraphs a, b and c in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
3. During performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purpose of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

x: Methods of Purchasing

Purchases should be made by one of the following methods: small purchase procedures; formal advertising; competitive negotiation or noncompetitive negotiation.

xi: Small Purchase Procedures

Competitive bids are not required for the purchase of materials, equipment, services, or supplies, costing in the aggregate of not more than \$100,000; however, prices shall, whenever practicable, be obtained from three or more qualified vendors. Written documentation shall be maintained showing the price quotations and supporting the final amount of the purchase. This documentation may be in the form of itemized purchase orders, vouchers, bills, sales slips, memoranda or oral price quotation, written proposals, or copies of or references to catalogues or price lists.

xii: Formal Advertising

Bids are publicly solicited and a firm-fixed price order (lump sum or unit price) shall be given to the responsible bidder whose bid conforms most closely to all the terms and conditions of the invitation for bids and is the lowest price.

xiii: Competitive Negotiation

Proposals are requested from known sources of particular goods or services, excluding professional services, as defined. Negotiations are normally conducted with more than one of the sources submitting proposals and either a fixed-price or cost reimbursement agreement is concluded, as appropriate. If competitive negotiation is used, the following requirements apply:

- *Proposals, including price, shall be solicited from an adequate number of qualified sources to permit reasonable competition with the nature and requirements of the procurement.*
- *When price is not the only factor, the request for proposal shall identify all significant evaluation factors.*
- *Written or oral discussions may be conducted with all responsible offerors who submit proposals, except that the discussions should be omitted where clearly inappropriate, unnecessary, or impracticable.*
- *The Purchasing Agent and the head of the using department shall review the proposals. Award shall be made to the most responsible offeror whose proposal will be the most advantageous to the Town, price and other factors considered. All contracts shall be awarded by the Town Manager. The Purchasing Agent shall notify unsuccessful offerors promptly. Upon request, unsuccessful offerors shall be informed of the reasons for not receiving the award.*
- *Competitive negotiation may be used if conditions are not appropriate for the use of formal advertising. The Purchasing Agent's records shall include written statements, prepared by those individuals making such decisions, citing the reasons for not using formal advertising.*

xiv: Noncompetition Negotiations

Subject to specific approval by the Town Manager, it may be determined that the Town's interest will be best served by purchasing certain goods and services through noncompetitive negotiations. Such determination shall, after thorough investigation, be supported by one of the following conditions:

- 1. A good or service may be truly unique and produced or provided only by one vendor.*
- 2. An emergency exists, in which case the emergency purchasing guidelines shall be adhered to.*
- 3. A department may have standardized in the use of a particular material, supply or type of equipment for the purpose of economy in maintenance.*
- 4. Purchases made in joint or cooperative effort between the Town and other governmental bodies may be through noncompetitive negotiation provided that said procurement is otherwise exempted from competitive requirements.*
- 5. The following types of procurement are specifically exempt from any competitive requirements:*
 - a. Expert witnesses, and other services associated with litigation or regulatory proceedings.*
 - b. An extension of the term of an existing contract for services, to allow completion of any work undertaken but not completed during the original term of the contract.*

Noncompetitive negotiation may be used only when a purchase or the award of a contract is infeasible under the methods set forth above. A written statement justifying the use of noncompetitive negotiation and selection of a particular vendor shall be placed on file prior to a purchase negotiated under noncompetitive conditions.

xv: **Negotiation with Lowest Responsive Bidder**

Unless canceled or rejected, a responsive bid from the lowest responsible bidder shall be accepted as submitted, except that if the bid from the lowest responsible bidder exceeds available funds, the Town may negotiate with the apparent low bidder to obtain a contract price within available funds. Such negotiations may only take place if described in writing and included in the Invitation for Bid.



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Items/Unfinished Items

MEETING DATE:

August 25, 2020

ITEM #: 6b**ITEM TITLE:**

Avondale Park

DESCRIPTION:**Pavilion and Shade Structure**

Staff is providing quotes to Town Council in regard to the pavilion as well as a shade structure that would attach to the existing playground equipment. Council previously directed staff to move forward on this item, indicating that funds would be used from “Reserves” for this project. At this time staff is seeking approval of the size pavilion that Town Council would like to see at Avondale Park; as well as approval of the shade structure. These proposals fall under existing contracts that can be used by the town. Information on the pavilions and shade structure is attached. [\(LINK\)](#)

Park Renaming Consideration

At a recent Town Council meeting, Councilman Bennett suggested that the Town consider renaming Avondale Park. Council may want to provide direction to staff in regard to this item. One item for consideration could be signage for our parks; as the three neighborhood parks (Avondale Park, Leonard Coleman Memorial Park, and Bedford Avenue Park) do not currently have signage.

Altavista Enrichment Outreach StoryBook proposal

Attached please find information from Mrs. Jane Green, a member of Altavista Enrichment Outreach, in regard to a Story Book project that they would like to pursue for Avondale Park. They will need Council’s authorization to pursue this item and apply for grants on the Town’s behalf. Correspondence from Mrs. Green is attached. [\(LINK\)](#)

RECOMMENDATION:

Per discussion of Town Council.

BUDGET/FUNDING:

No funds are included in the FY2021 Budget for these items.

POTENTIAL ACTION:

- Per Council’s discussion:

- Consensus to approve the pavilion and/or shade structure quotes; as provided.
- Consensus on renaming Avondale Park request.
- Consensus to support/authorize the Altavista Enrichment Outreach StoryBook project
- Provide staff input as to any items Council would like to see addressed/researched.
- Defer action and place on a future meeting agenda.
- Take No Action.

ATTACHMENTS:

- Pavilion and Shade Structure Information ([LINK](#))
- Altavista Enrichment Outreach correspondence ([LINK](#))

AVONDALE PARK
SHADE STRUCTURE REQUEST
OPTIONS

Design Criteria: Structure is typically designed for a 25 lb live load and a 90 mph wind load capacity, but can be designed based on specific site requirements upon request. All structural members are ASTM A-500 U.S. grade B steel. Welded connection plates shall be ASTM A-36 hot rolled steel. All fabrication performed to latest AISC standards by AWS Certified welders. All framing connections are done using A325 grade bolts within concealed access openings from above and will later be concealed by the roofing. All roof framing shall be flush against the roof decking to eliminate the possibility of bird nesting.

Tubular Steel Columns and Beams: Standard column dimension shall be 5" x 5" x 3/16" tubular steel welded to 5/8" base plates for surface mounting. Main support beams are 7" x 5" x 3/16" and purlins are 6" x 3" x 1/8" and 5" x 3" x 1/8". Steel sizes are preliminary and may change due to ongoing review and final engineering.

Roofing: 24 Ga. pre-cut steel Multi-Rib panels with Kynar 500 finish in a variety of colors with white underside. Standard roof slope is a 4/12 pitch with a eave height of 7'-6". Attached to structural framing with exposed self tapping screws painted to match roof color. Matching 24 Ga. trim included.

Frame Finish: All steel framework will receive a corrosion protective TGIC Polyester powder coat, electro-statically applied and cured at 400°F. A large selection of standard colors are available.

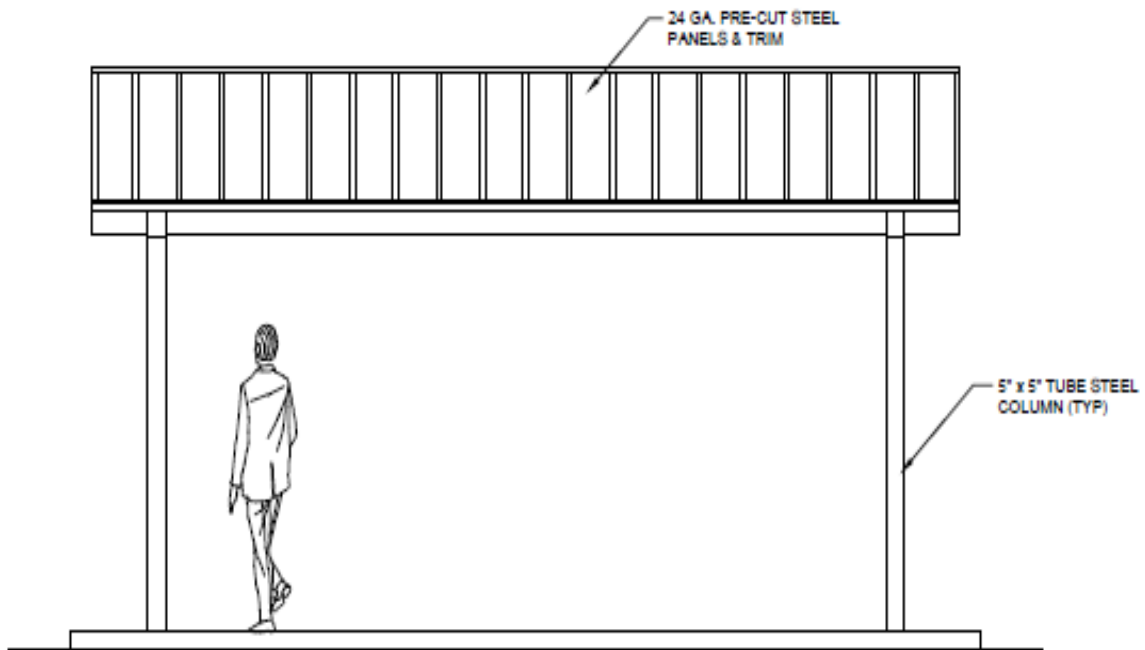
Foundation: All columns need to be anchored to concrete footings (footing design provided separately). Columns can be surface mounted to footings with anchor bolts at or below finish slab elevation or they can be embedded directly into the footing without base plates upon request. Anchor bolts and bracing templates are included. Optional base plate covers are available at an additional cost.

Hardware: All structural hardware and roofing fasteners shall be provided.

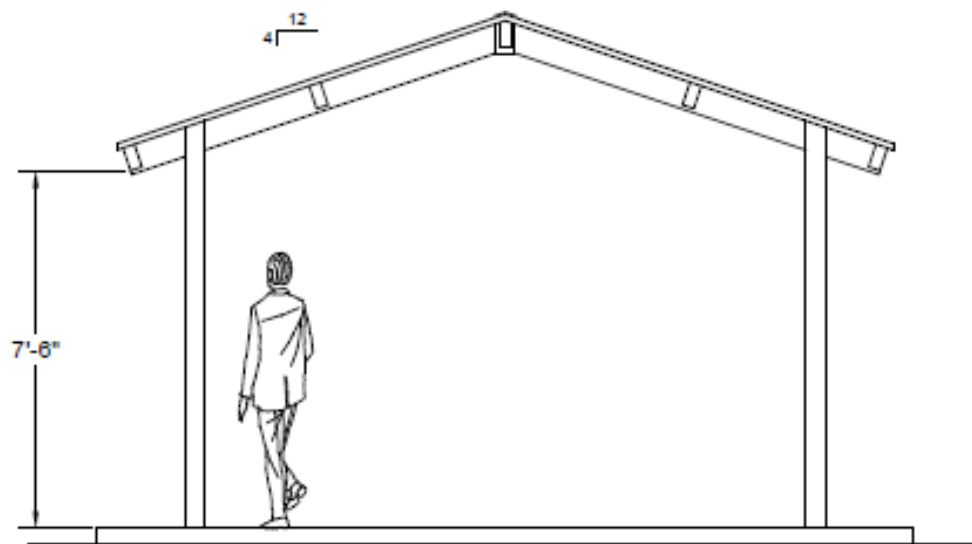
Warranty: 10 years against manufacturer defects.

OPTION 1
10 X 16 Two Picnic Table Shelter

Side View



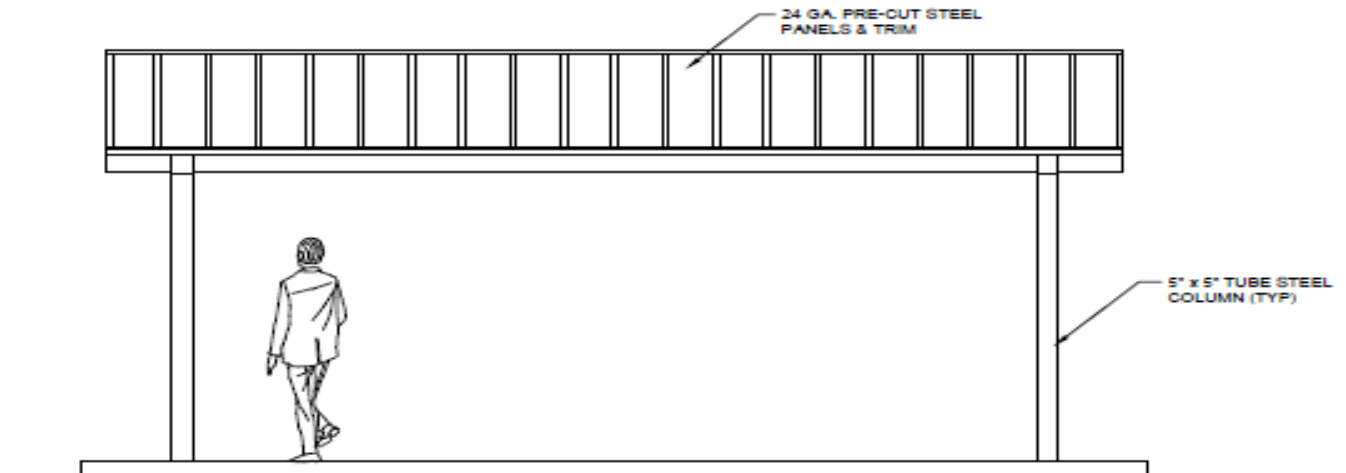
End View



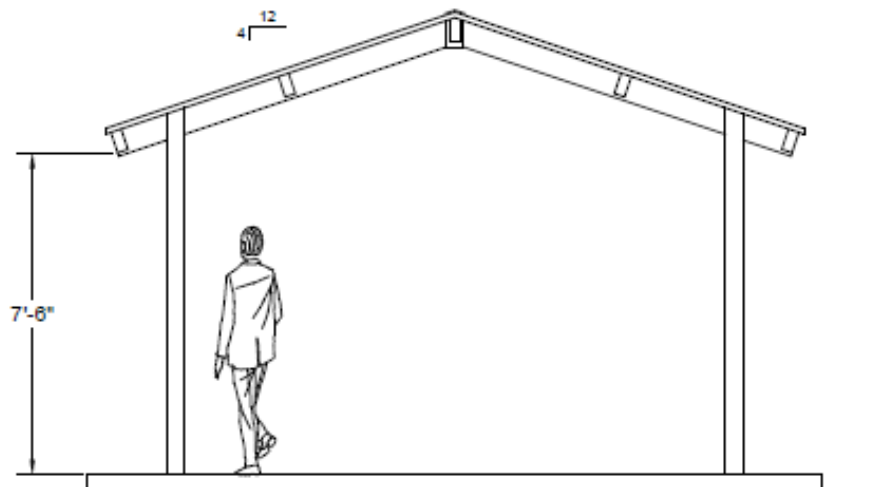
OPTION 2

10 X 22 Three Picnic Table Shelter

Side View

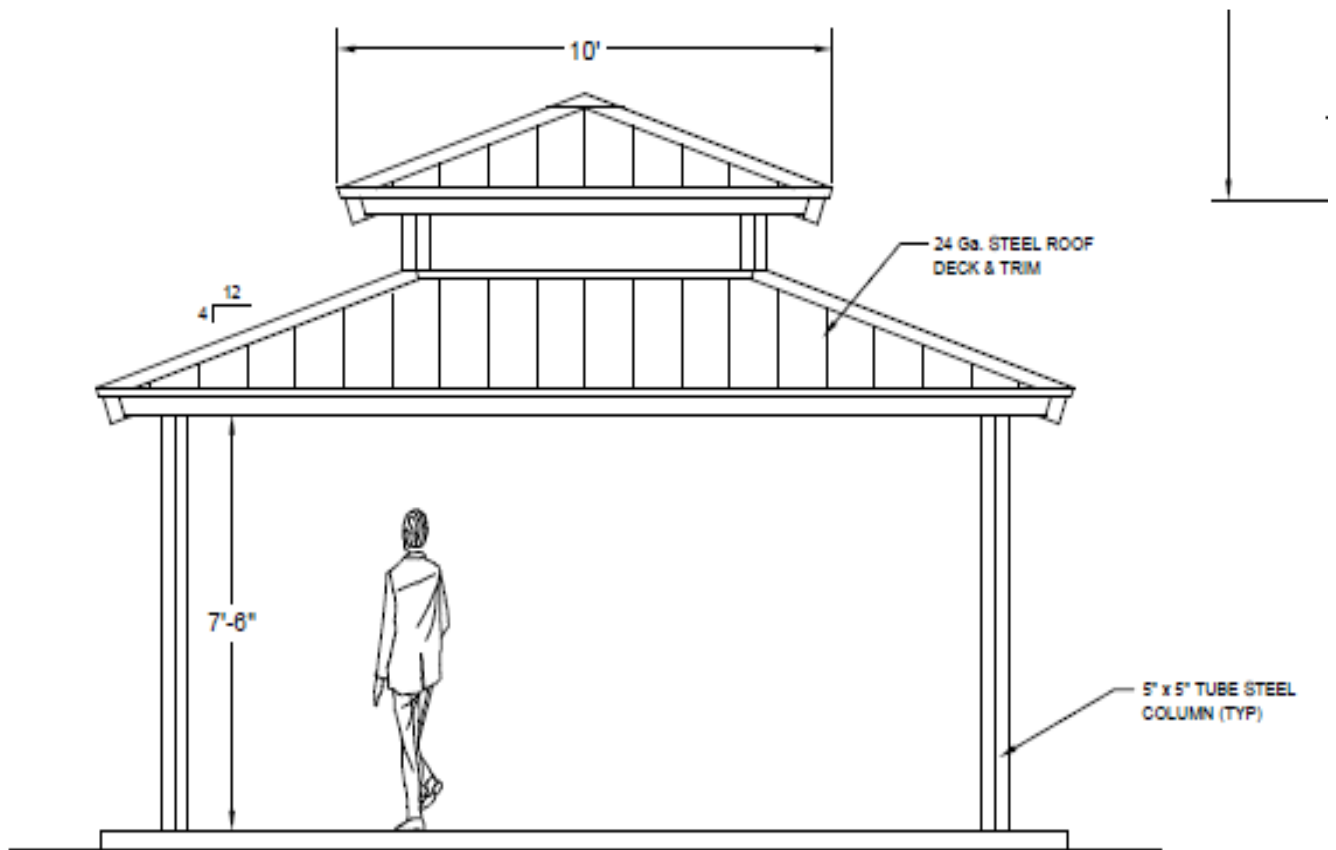


End View



OPTION 3

18 X 18 Four Picnic Table Shelter with Vented Roof



Sample Pavilion Photo



All Recreation	OPTION 1 10x16 Shelter	OPTION 2 10x22 Shelter	OPTION 3 18x18 Shelter
All Recreation	\$27,651.28	\$21,154.85	\$28,683.42
Concrete by Others	\$4,312.00	\$5,096.00	\$6,776.00
Building Permit	\$200.00	\$200.00	\$200.00
Excavation & Forming by Others	\$3,080.00	\$3,640.00	\$4,200.00
Finish Grading & Seeding	\$800.00	\$800.00	\$800.00
Total Estimate	\$36,043.28	\$30,890.85	\$40,659.42

MTS Recreations	OPTION 1 10x16 Shelter	OPTION 2 10x22 Shelter	OPTION 3 18x18 Shelter
MTS Recreations	\$14,747.02	\$15,969.12	\$21,791.02
Concrete by Others	\$4,312.00	\$5,096.00	\$6,776.00
Building Permit	\$200.00	\$200.00	\$200.00
Excavation & Forming by Others	\$3,080.00	\$3,640.00	\$4,200.00
Finish Grading & Seeding	\$800.00	\$800.00	\$800.00
Total Estimate	\$23,139.02	\$25,705.12	\$33,767.02

Currently lead times are approximately 10 weeks from order release.



GameTime c/o Cunningham Recreation
PO Box 240981
Charlotte, NC 28224
800.438.2780
704.525.7356 FAX

**AVONDALE
PARK** 12/19/2019
Quote #146954

Town of Altavista - Integrated Shade

Town of Altavista
Attn: J. Waverly Coggsdale, III
510 Seventh Street
Altavista, VA 24517
Phone: 434-369-5001
Fax: 434-369-4369
jwcoggsdale@altavistava.gov

Ship to Zip 24517

Quantity	Part #	Description	Unit Price	Amount
1	H12027	GameTime - 12' Heavy Wall Upright [Basic: _____]	\$477.00	\$477.00
1	18787	GameTime - Umbrella Canopy [Basic: _____] [Fabric 1: _____]	\$6,121.00	\$6,121.00
1	INSTALL	MISC - Removal and Installation	\$4,475.00	\$4,475.00
Contract: OMNIA			Sub Total	\$11,073.00
			Discount	(\$1,583.52)
			Freight	\$649.88
			Total	\$10,139.36

Comments

Site must be clear, level, free of obstructions, and accessible. Site should permit installation equipment access. Purchaser shall be responsible for unknown conditions such as buried utilities, tree stumps, bedrock or any concealed materials or conditions that may result in additional costs.

S:

EW IS PLOTTED AT A SCALE OF 1"=5'.

ROWS AT DECK CORNERS INDICATE ORIENTATION OF LABEL ON EACH UPRIGHT. SEE UPRIGHT LABEL DETAIL.

INNER/OPERATOR SHALL INSTALL AND MAINTAIN PROTECTIVE SURFACING WITHIN THE

USE ZONE (U.S.) OR PROTECTIVE SURFACING ZONE (CANADA) OF ALL PLAY EQUIPMENT

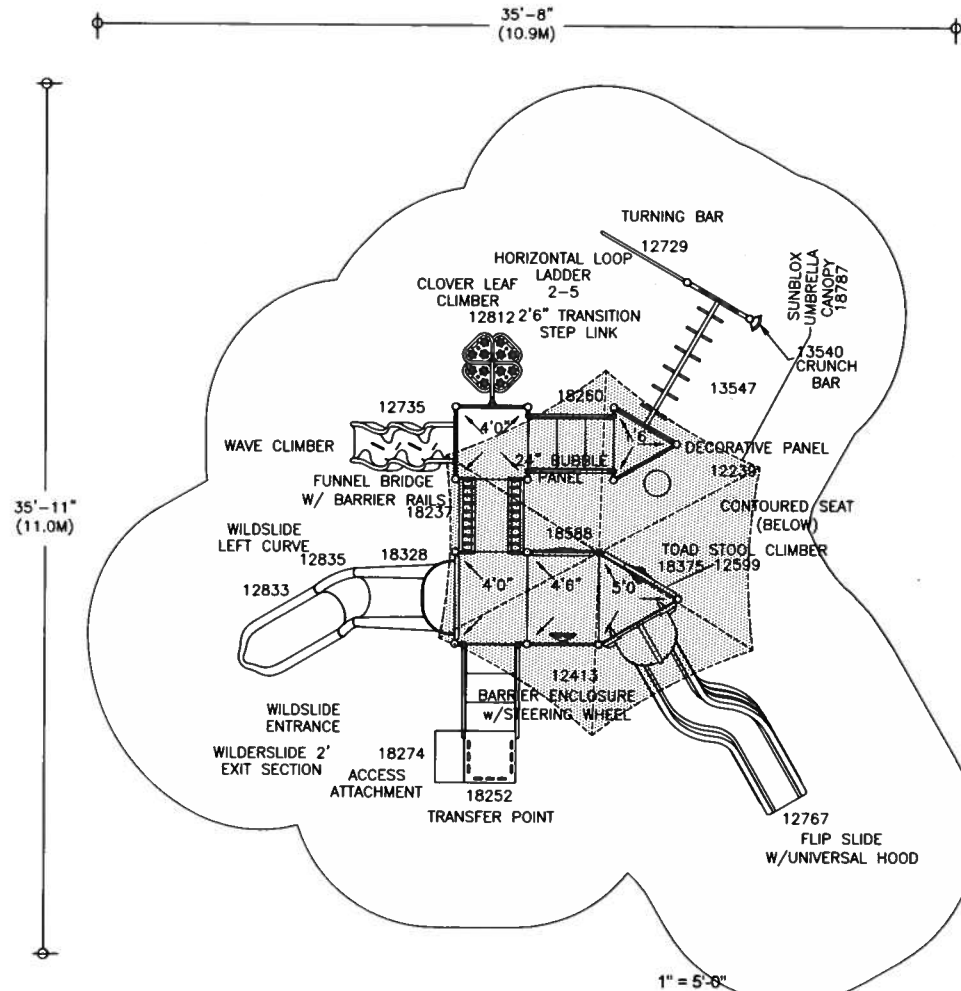
TO COMPLY WITH ASTM F-1292 AND ASTM F-1487 (U.S.) OR CAN/CSA-Z-614 (CANADA)

LARGER OVERALL DIMENSIONS SHOWN REPRESENT ASTM USE ZONE AND CSA PROTECTIVE SURFACING

ZONE. FOR CANADIAN INSTALLATIONS ONLY, AN ADDITIONAL 1.8m-LONG NO-ENCROACHMENT ZONE IS

REQUIRED BEYOND THE PROTECTIVE SURFACING ZONE OF SLIDES, SPACE SHUTTLES AND OTHER PLAY

EQUIPMENT CAUSING THE USER TO BE PROPELLED FORWARD.



A proposal for the Altavista Town Council from Altavista Outreach and Enrichment:

The StoryWalk® Project was created by Anne Ferguson of Montpelier, VT and developed in collaboration with the Kellogg Hubbard Library. A StoryWalk® is a fun, educational activity that places a children's story (literally a book taken apart) along a popular walking route in your community. StoryWalk® helps build children's interest in reading while encouraging healthy activity for both adults and children.

Recent research supports an interactive and experiential process of learning spoken and written language skills that begins in early infancy. We now know that children gain significant knowledge of language, reading, and writing long before they enter school.

Our concern in the Altavista community is the number of children who enter pre-K or Kindergarten not having the pre-literacy skills needed for success learning to read. It is part of the mission of Altavista Outreach and Enrichment to encourage literacy in our community, and every opportunity we have to introduce literature to children is a step in the right direction.

Altavista Outreach and Enrichment (AOE) would like to place a StoryWalk in the Avondale Park where many children and their families would have access to it. AOE would raise funds for the frames, posts, and the books used. We would change the book at least monthly.

A StoryWalk consists of about 18 stations. At Avondale Park, this could be around the perimeter of the playground, or around the perimeter of the park (along the tree line). A semi-local example, should anyone like to visit, is at Timbrook Library on Leesville Road. (Please note, though, that ours would be of a sturdier construction.)

AOE is currently seeking funding for this project, as well as for the Little Free Library project that Town Council approved in the Spring. As before, we need permission for the project before applying for grants.

Thank you.





TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Items/Unfinished Items

MEETING DATE:

August 25, 2020

ITEM #: 6c**ITEM TITLE:**

Electric Vehicle Charging Station (downtown) review

DESCRIPTION:

Previously Town Council requested that staff investigate the feasibility to install an “electric vehicle charging station” in the downtown area. During staff’s review it became evident that this is an item that needs additional discussion and consideration. Information such as the Electric Vehicle Charging Info Sheet [\(LINK\)](#) SEMAConnect “White Paper” is very informative and may be of assistance in helping Council better understand the issue. The attached information from SOLSmart just came via email last Thursday (August 20th). [\(LINK\)](#) Ultimately it may be necessary to issue a Request for Proposals so that interested companies can assist with the evaluation of a site or sites and provide the equipment and installation services. [\(LINK\)](#) Staff has also provided a copy of an “Electric Vehicle Charging Station Guidebook” from Chittendon County Regional Planning Commission in Vermont under separate distribution.

RECOMMENDATION:

Per discussion of Town Council. Staff would recommend that Council further evaluate this option and how it fits into the overall “marketing” plan for the downtown area and Altavista as a whole.

BUDGET/FUNDING:

No funds are included in the FY2021 Budget for this items.

POTENTIAL ACTION:

- Per Council’s discussion:
 - Consensus to direct staff in regard to installation of an “electric vehicle charging” station.
 - Provide staff input as to any items Council would like to see addressed/researched.
 - Defer action and place on a future meeting agenda.
 - Take No Action.

ATTACHMENTS:

- Electric Vehicle Charging Info sheet [\(LINK\)](#)
- SemaConnect White Paper: Charging Levels Explained [\(LINK\)](#)
- SOLSmart Report [\(LINK\)](#)






Electric Vehicle Charging Stations

Electricity is considered an alternative fuel under the Energy Policy Act of 1992. Electricity can be produced from a variety of energy sources, including oil, coal, nuclear energy, hydropower, natural gas, wind energy, solar energy, and stored hydrogen. **Plug-in electric vehicles (PEVs)**, the collective term for plug-in hybrid electric vehicles (PHEVs) and all-electric vehicles (EVs) are capable of drawing electricity from off-board electrical power sources (generally the electricity grid) and storing it in batteries.

In PEVs, onboard rechargeable batteries store energy to power one or more electric motors. Vehicles that run only on electricity produce no tailpipe emissions, but there are upstream emissions associated with the production of electricity.

Types of Charging Stations

There are three categories for electric vehicle charging stations, a summary of which is shown below. Staff has been asked to explore the option of installing a DC Fast Charging Station in town.

Level 1 Charging 2 to 5 miles of range per 1 hour of charging	Level 2 Charging 10 to 20 miles of range per 1 hour of charging	DC Fast Charging 60 to 80 miles of range per 20 minutes of charging
 J1772 charge port <p><u>Alternating Current (AC)</u> Level 1 equipment (often referred to simply as Level 1) provides charging through a 120 volt (V) AC plug. Most, if not all, PEVs will come with a Level 1 cordset, so no additional charging equipment is required. On one end of the cord is a standard <u>NEMA</u> connector, (for example, a NEMA 5-15, which is a common three-prong household plug) and on the other end is an SAE J1772 standard connector (often referred to simply as J1772, shown in the above image). The J1772 connector plugs in to the car's J1772 charge port, and the <u>NEMA</u> connector plugs in to a standard <u>NEMA</u> wall outlet.</p> <p>Level 1 charging is typically used when there is only a 120V outlet available, such as while charging at home, but can easily provide charging for all of a driver's needs. For example, 8 hours of charging at 120V can replenish about 40 miles of electric range for a mid-size PEV. As of 2019, <u>less than 5% of public charging outlets in the United States were Level 1.</u></p>	 J1772 charge port <p>AC Level 2 equipment (often referred to simply as Level 2) offers charging through 240V (typical in residential applications) or 208V (typical in commercial applications) electrical service. Most homes have 240V service available, and because Level 2 equipment can charge a typical PEV battery overnight, it is commonly installed at PEV owners' homes for <u>home charging</u>. Level 2 equipment is also commonly used for <u>public and workplace charging</u>. This charging option can operate at up to 80 amperes (Amp) and 19.2 kW. However, most residential Level 2 equipment operates at lower power. Many of these units operate at up to 30 Amps, delivering 7.2 kW of power. These units require a dedicated 40-Amp circuit. As of 2019, <u>over 80% of public outlets in the United States were Level 2.</u></p> <p>Level 2 charging equipment uses the same J1772 connector and charge port that Level 1 equipment uses. All commercially available PEVs have the ability to charge using Level 1 and Level 2 charging equipment. Although Tesla vehicles do not have a J1772 charge port, Tesla does sell an adapter.</p>	   CCS charge port CHAdeMO Tesla <p><u>Direct-current (DC)</u> fast charging equipment (typically 208/480V AC three-phase input), enables rapid charging along heavy traffic corridors at installed stations. As of 2019, <u>about 15% of charging outlets in the United States were DC fast chargers.</u> There are three types of DC fast charging systems, depending on the type of charge port on the vehicle: SAE Combined Charging System (CCS), CHAdeMO, or Tesla.</p> <p>The CCS (also known as J1772 combo) connector is unique because a driver can use the same charge port when charging with Level 1, 2, or DC fast equipment. The only difference is that the DC fast charge connector has two additional bottom pins. The CCS connector is used by Chevrolet and BMW PEVs, for example</p> <p>The CHAdeMO connector is the most common of the three connector types and is used by Nissan, Mitsubishi, and Toyota PEVs, for example.</p> <p>Tesla vehicles have a unique charge port and connector that works for all their charging options including their fast charging option, called a supercharger.</p>

Developing Infrastructure

In addition to fueling infrastructure considerations like cost, regulations, safety, siting, and type of equipment, installing EVSE can involve complex payment structures, data collection, ownership models, parking, and signage requirements. The information provided is based on data staff obtained from the Department of Energy, various studies, and installation cost shared by some companies. These number are estimates for discussion purposes.

The costs associated with owning and operating EVSE

The main cost drivers are the power of the unit, in kW; whether it requires a pedestal; and whether it is networked with communication or payment gathering capability.

1. Hardware cost for DC Fast Networked:

Networking enables chargers to communicate by WiFi or cellular signal to report usage, charge customers, and collect payment information.

Level	Type	Per-charger cost
DC Fast	Networked 50 kW	\$28,401
DC Fast	Networked 150 kW	\$75,000
DC Fast	Networked 350 kW	\$140,000

optional EVSE equipment (e.g., RFID card reader);

2. Installation cost, which may include contractor labor and materials for connecting EVSE to the electrical service (e.g., panel work, trenching/boring, and repaving parking) and new electrical service or upgrades (e.g., transformers)

Power will be the determining factor in the cost of installation. As the chart below shows at a site with one 50-kW charger, installation costs are approximately \$45,000. Increasing the power by 7 times to 350 kW results in an installation cost of approximately \$65,000, reflecting higher material cost and the probability that switchgear and distribution lines may need to be upgraded

	50 kW				150 kW				350 kW			
	1 charger per site	2 chargers per site	3-5 charger per site	6-50 chargers per site	1 charger per site	2 chargers per site	3-5 chargers per site	6-20 chargers per site	1 charger per site	2 chargers per site	3-5 chargers per site	6-10 chargers per site
Labor	\$19,200	\$15,200	\$11,200	\$7,200	\$20,160	\$15,960	\$11,760	\$7,560	\$27,840	\$22,040	\$16,240	\$10,440
Materials	\$26,000	\$20,800	\$15,600	\$10,400	\$27,300	\$21,840	\$16,380	\$10,920	\$37,700	\$30,160	\$22,620	\$15,080
Permit	\$200	\$150	\$100	\$50	\$210	\$158	\$105	\$53	\$290	\$218	\$145	\$73
Taxes	\$106	\$85	\$64	\$42	\$111	\$89	\$67	\$45	\$154	\$123	\$92	\$62
Total	\$45,506	\$36,235	\$26,964	\$17,692	\$47,781	\$38,047	\$28,312	\$18,577	\$65,984	\$52,541	\$39,097	\$25,654

Source: International Council on Clean Transportation, 2019

3. engineering review and drawings \$10,000

4. Additional capital cost, which may include:

hardware extended warranty - \$400 a year

repair labor warranty - \$400 a year

5. Operation and maintenance cost - varies

DCFC units require ongoing maintenance because they have cooling systems, filters, and other components that do not exist in Level 1 or Level 2 units.

Sample Maintenance Items

- Replacement of charge cord due to vandalism or misuse;
- Repair or replacement of EVSE components (if not covered under warranty);
- Technician troubleshooting (if not covered in network subscription fees);
- Manual resets for software malfunction (if not covered in network subscription fees);
- Preventative and corrective maintenance.

6. electricity consumption and demand charges \$2,000/month

7. EVSE network subscription to enable additional features \$900/annually

8. upfront costs that are incurred to identify viable locations for an EVSE station. This may include fees for consultants, site evaluations and feasibility studies needed to assess the electrical capacity and location of utility service lines serving a given facility or site \$25,000±

Commercial electric vehicle charging: understanding the differences between charging station levels and speeds.

Not all charging stations are equal: from **Level 1** (for special applications) up to **Levels 2** (routine applications) and **Level 3** (road tripping), here's what you need to know to pick the right charging station for your property and drivers.

The charge level indicates how long it takes to charge an electric vehicle (EV).

If you've decided to "level up" your property with EV charging stations, you've made an excellent choice. Commercial properties considering electric vehicle (EV) charging stations are future-proofing while offering an attractive feature to patrons and tenants. Even better, installing charging stations can be a snap.

But what *level* of charging station is right for your property? Different charging levels have emerged to meet a variety of needs and use-case scenarios. Most commercial properties favor Level 2 charging for its excellent balance of benefits versus costs, but before you make that long-term investment, make sure you understand each level.

The "gas station experience" does not apply to the way people charge electric vehicles.

With gas vehicles, we're used to going to a gas station and standing there for a few minutes while we fill up the tank. With electric vehicles, it's much different. Now drivers "fuel" their vehicle while the car is parked and they go do something *else* (like work or sleep).

In other words, "fueling" no longer requires the driver's presence, freeing them for other tasks and obligations. The question ceases to be "how long must I stand here?" and becomes "can I 'fuel' enough in the time my task will take?" That means properties installing charging stations must consider which level will provide the power and speed needed for the time their customers or tenants will have.

EV Charging Level Comparison

	Level 1	Level 2	Level 3 (DC Fast Charging)
Power	1.4kW	7kW	50kW
Source	Standard outlet	Special Charging Station	
Charge Rate (Est.)	Est. 5 miles/hour	25 miles/hour	200 miles/hour
Optimal Use-Case	Occasional Use	Everyday Use	Road Tripping

With electric vehicles, “fueling” no longer requires the driver’s presence, freeing them for other tasks.

Level 2 rules for everyday use.

“Sometimes people think if Level 2 is good, then Level 3 must be better,” says Mark Pastrone, Vice President of Business Development at SemaConnect, “but that’s not an accurate way of understanding charging.”

Remember, EV drivers do not remain with the car while it charges, which means a property selecting an EV charging station does not *need* to replicate the gas station experience (which isn’t even possible today). Consequently, the importance of “speed” as a factor diminishes *unless* your property finds itself in a special use-case. The most important question is not about speed at all; it’s about use-case scenarios and driver needs.

Which level best meets the needs of the drivers who will be visiting your property?

“Most EV drivers only need about 20 miles or so of range to ‘top-off’ the battery when running errands or commuting to work,” says Pastrone.

Level 2 can easily handle such needs in the time drivers will spend at the destination property. More to the point, it is typically the most cost-efficient solution. Level 3 – or DC Fast Charge (DCFC) – stations definitely have their place, but they have other considerations compared to Level 2 charging for most commercial scenarios. Only about half of the electric vehicles on the road are compatible with DCFC. In addition, DCFC stations are much, much more expensive to purchase, install, and operate.

When might a DCFC station be right for your property?

DCFC charging stations can cost tens of thousands of dollars to buy and install; and these units require the property to supply sufficient electrical capacity, which may necessitate infrastructure upgrades.

Plus, DCFC stations will likely increase property power bills, although this aspect can vary. However, DCFC is ideal for applications that require shorter charge times. For example:

- **Road tripping:** If your business or property is a popular stop along highway and interstate routes, a DCFC charger provides a valuable resource while also encouraging these long-distance drivers to visit *you* as opposed to other stops.
- **Fleets:** If you own a fleet of electric vehicles that are used throughout the day for business purposes, having a fast-charge option may be effective in keeping your fleet fully charged.
- **Car sharing:** Short-term (often hourly) car rentals represent a growing business model in metro areas throughout the U.S. DCFC stations can quickly charge these vehicles between rental sessions.

Ultimately, EV charging is really about meeting the range needs of EV drivers in a way that aligns with their habits while remaining cost-effective for the property.

For more information, please contact SemaConnect.



SemaConnect is the leading provider of electric vehicle amenities to the North American commercial and residential property market. With SemaConnect as your EV partner, you don’t have to worry about station management. As a proven leader in serving the Class A property market, SemaConnect manages all aspects of your EV amenities so you can make the most of your visitors’ experience.

1-800-663-5633
www.semaconnect.com
info@semaconnect.com
4961 Tesla Drive
Bowie, MD 20715

JULY 2020

SOLAR AND ELECTRIC VEHICLES: A GUIDE FOR LOCAL GOVERNMENTS



CADMUS



ICMA



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Source: Capital District Clean Communities Coalition

This report was written by staff experts at The Cadmus Group, a partner organization for the national SolSmart program. The Cadmus Group also completed layout and design for the report. The report was edited by The Solar Foundation.

For questions about the report, contact us at info@solsmart.org.

About SolSmart

SolSmart is a national designation and technical assistance program that recognizes leading solar communities and empowers additional communities to expand their local solar markets. Funded by the U.S. Department of Energy Solar Energy Technologies Office, SolSmart strives to cut red tape, drive greater solar deployment, and make it possible for even more American homes and businesses to access solar energy to meet their electricity needs. As of July 2020, more than 370 local governments in 41 states and the District of Columbia have achieved SolSmart designation, representing more than 90 million Americans.

SolSmart is led by The Solar Foundation and the International City/County Management Association. The SolSmart program can provide no-cost consultations and technical assistance to help local governments learn more about promoting PV and EV integration. Learn more at [SolSmart.org](https://solsmart.org).



Source: Capital District Clean Communities Coalition

ACKNOWLEDGEMENT AND DISCLAIMER

This material is based upon work supported by the U.S. Department of Energy's Office of Energy Efficiency and Renewable Energy (EERE) under the Solar Energy Technology Office Award Number DE- DE-EE0007155.

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Overview

Solar photovoltaic (PV) energy and electric vehicles (EVs) are two important tools to help local governments meet their climate and energy goals and encourage economic growth. When paired together, PV and EVs can provide even greater benefits. Charging EVs with renewable energy instead of power generated by coal, oil, or gas reduces their greenhouse gas emissions, which are largely determined by the electricity source. Moreover, homes, businesses, and municipal buildings can install larger PV systems to account for the anticipated EV charging load. Larger solar installations provide increased clean energy benefits and can result in a more attractive payback period than if the solar panels and EV charging stations were installed separately. Conducting site analyses, permitting, and inspections for electric vehicle supply equipment (EVSE) and PV simultaneously can also save local governments and community members time and money. Beyond cost and emissions savings, integrating PV and EVs can generate benefits for the electricity grid, although such benefits are highly dependent on the geographic location of the project and the nature of the local electricity market.*

Both solar PV and EVs are quickly becoming more popular among businesses, local governments, and households, as costs dramatically go down and more people seek out the benefits of these clean energy technologies. The long-term trend remains clear: Solar PV and EVs are poised to take over increasing shares of the electricity and transportation fuels markets in the next few years. Local governments can optimize the impact of combining these two technologies by working with utility commissions, industry, and other stakeholders to develop coordinated PV and EV policy approaches that take into account the unique attributes of the local grid.

Local governments can maximize the benefits of these technologies in five main ways. First, they can **educate property owners and community members** on the opportunities to integrate PV and EVs and the benefits of doing so. Second, they can organize **group purchase campaigns** to support both PV and EV technologies. Third, they can lead by example through **public actions and investments** and share their lessons learned to encourage integration by other public or private entities. Fourth, governments can provide **financial and non-financial incentives** to encourage action on PV and EV integration. And fifth, they can **adjust local regulations** to help reduce the costs and ease the integration of PV and EV charging. Through these five levers of impact, local governments can facilitate substantial decarbonization and help residents and businesses enjoy the benefits of clean energy.

THIS REPORT OUTLINES:

- The different technical configurations that can be used to integrate PV and EVs.
- The programs and policies that local governments can use as levers to promote PV and EVs together, with examples from across the nation.

Local governments that are interested in using these tools are encouraged to join the national SolSmart program, which provides no-cost technical assistance and the opportunity to achieve designation as SolSmart Gold, Silver, or Bronze. Learn more at [SolSmart.org](https://solsmart.org).

*In some utility settings like much of California, additional load from EV charging during the day can absorb excess power generated by PV, and potentially shift demand from later in the day when demand peaks. On the other hand, the wrong type of EV load or the wrong timing could have no benefit or even adverse effects. Striking the right balance can reduce the need for investments in the local distribution system. Additional information on how local governments can collaborate with their utilities on solar and electrification policies is found in the SolSmart issue brief *Solar and Electrification: A Beneficial Partnership*, available here: <https://solsmart.org/resources/solsmart-issue-brief-solar-electrification-a-beneficial-partnership/>.

Background: Configuring PV and EV Charging

Before discussing the levers of impact available for local governments, it is important to understand the range of technical configurations that can be used in projects involving both solar PV and EVs. First, we describe some common options for physically linking PV and EV charging by co-locating the two technologies on the same site. Second, we consider configurations in which the customer may use PV at a different site from where EV charging occurs, such that the two are only economically linked by providing solar credits to offset electricity consumption.

POLICY BACKGROUND FOR CONFIGURING PV AND EV CHARGING SYSTEMS

Net Metering is a metering and billing arrangement that allows owners of solar energy systems to export excess electricity generated to the utility grid. In the context of a combined PV-EVSE system, customers will export any electricity the solar panels produce beyond what is required for EV charging or other electricity needs. Customers thus offset the electricity they draw from the grid throughout the billing cycle and pay for the net energy consumed or receive credit or payment for the net energy produced.

Virtual Net Metering uses the same compensation mechanism and billing schemes as net metering without requiring the energy generation and the electrical loads to be located behind the same meter. This setup has been used in shared renewable energy projects where multiple customers, or a single customer with multiple electrical loads, partake in net metering based on their portions of a single system.

Net metering policies vary widely between states and in specific utility service territories, and the structure of the policy can have a significant impact on the value of PV alone and the value of coupling PV with EV charging. Local governments can turn to resources such as the N.C. Clean Energy Technology Center [Database of State Incentives for Renewables and Efficiency](#) (DSIRE) to learn about the utility regulatory context in their states, as well as other policies and incentives related to renewables.

When considering these options, an important factor to keep in mind is the level of EV charging that will be required. The boxes below describe the different charging levels available for light-duty EVs. Understanding the different charging levels will help inform the feasibility of each configuration option, as further explained below.

LEVEL 1	LEVEL 2	LEVEL 3
<p>Level 1 charging only requires a regular wall outlet and can charge an EV in about 8-15 hours. Level 1 is predominantly used for home charging, though in certain cases it can also be used for workplace and public charging (e.g., when vehicles are expected to park for a very long time).</p>	<p>Level 2 charging requires installation of specialized equipment and can charge an EV in about 3-8 hours. Level 2 is used for home charging as well as workplace and public charging.</p>	<p>Level 3 charging (commonly referred to as Direct Current Fast Charge, or DCFC) requires installation of specialized equipment and typically electrical upgrades too. It can charge an EV in about 20 minutes-1 hour and is used for public, on-the-go charging.</p>

Physical Configurations on the Same Site

Geographic co-location of both PV and EVSE is one of the simplest ways that linkage can occur. In these cases, not only are the PV and EV charging co-located, but they are typically also economically linked by virtue of being on the utility bill of the same customer. There are several options for what a physical configuration can look like, including whether solar and EV charging are metered separately or together. The benefits of installing both solar and EV charging behind the same meter include lower metering costs and simpler billing structures. In areas where net metering policies are in place, customers can offset the cost of power used with any extra PV production that goes back to the grid (see box, p 4).

Another option is to include a feature known as charge management. For the purposes of this discussion, charge management refers to the ability of the host of the charger (the site host) to control charging via software on the charger side (as opposed to software on the vehicle itself). The site host can establish

software protocols to reduce electricity costs by pausing, delaying, or ramping EV charging speed up or down in order to reduce peak demand and/or peak period electricity consumption (see box, p 4). Charge management is particularly useful in settings where multiple vehicles may be charging at the same location and/or where high-powered charging is offered. When battery energy storage is included, charge management can be used to enable greater value from on-site renewable energy sources such as solar, although it does add substantially to project costs.

MANAGING VARIABLE ENERGY BILLS

The integration of charging and PV has implications for managing energy bills. Two bill features are important to understand in order to reduce and stabilize electricity costs for consumers.

Demand charges refer to a component of a bill that is typically based on the maximum amount of power drawn over a specific period of time (e.g., 15 minutes) across the whole billing period. Given that EVs can draw significant load, they can lead to large and variable demand charges.

Peak period usage is the amount of energy used by customers during times defined as “peak,” which tend to be more expensive because it is more costly for the utility to provide power. In some jurisdictions, under an arrangement known as time-of-use rates, customers are charged more for electricity used during these peak periods.

As both of these features become more common, charge management allows customers to co-optimize solar output and EV charging to reduce their overall electricity costs.



Source: Jason Wagner, NREL

BEHIND THE SAME METER WITHOUT CHARGE MANAGEMENT OR STORAGE

Description: PV and EVSE can be installed behind the site's electric meter without charge management or storage. The solar energy production supports the EV charging and any other on-site load, with any excess energy produced going back to the grid. Without a charge management system, EV charging is simply controlled by the vehicle's needs, without regard to the impact on the utility bill or how much solar production is available. And without storage, EV charging powered directly by solar can only occur when PV production is occurring.

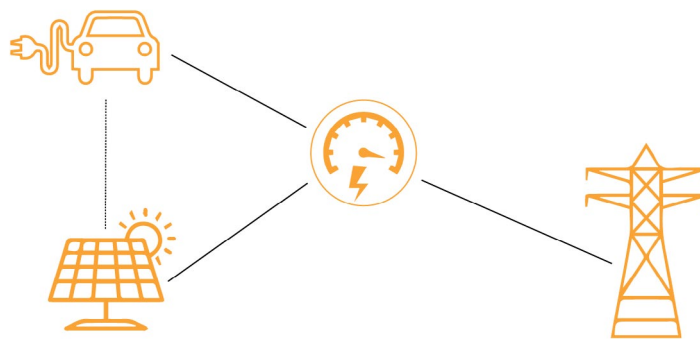


Figure 1: Without charge management or storage

Suitability: This simple configuration is well suited in cases with Level 1 or Level 2 charging with a low number of charging ports, and/or in settings where demand charges are not a priority concern. As the simplest configuration, it is desirable in situations where the site host is interested in reducing upfront costs and in which the savings associated with charge management and storage are not likely to offset the increased costs. This configuration may not be optimal in cases where many EVs are charging at the same time, or there are large power draws through Level 2 or DCFC that can lead to high utility bills because of demand charges.

Example: Having EV chargers in the garage of a commercial building that has PV on the roof, but without any mechanisms to coordinate production and consumption between the two or to store excess energy.

BEHIND THE SAME METER WITH CHARGE MANAGEMENT

Description: This is the same as the basic system with PV and EVSE installed behind the meter, but with charge management included. Charge management software is a critical link to optimize the benefits of PV and EV together, allowing the system to ramp up charging during times of solar production and ramp down during other times.

Suitability: This configuration is particularly valuable for settings such as (1) DCFC public charging, (2) locations with large numbers of vehicles that could charge simultaneously, and (3) locations where medium- and heavy-duty vehicles charge, since all these examples can include very high demand charges and uneven utilization from hour to hour and day to day.

Example: The Pittsburg Unified School District in Pittsburg, California uses a custom charge management solution for its charging of electric school buses, enabling the district to maximize the consumption of its on-site solar and wind generation.¹

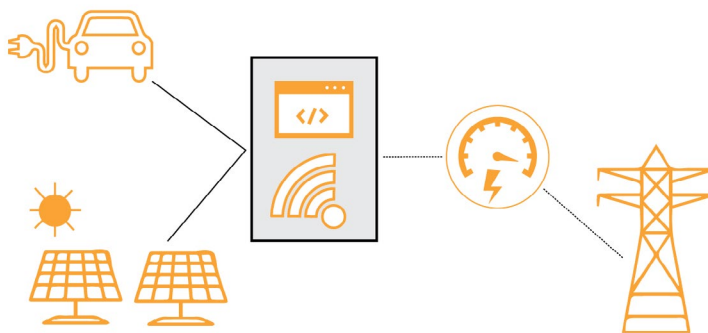


Figure 2: With charge management

BEHIND THE SAME METER WITH STORAGE

Description: Another way to augment a behind-the-meter setup is to include battery storage. Behind-the-meter storage allows customers to capture the energy from on-site PV generation and utilize it later when needed. This can help reduce demand charges and match PV production to EV charging demands. With the proper equipment, it can also enable more rapid charging of vehicles than would otherwise be possible based on the site's electric service constraints. Additionally, installing on-site storage can enhance a customer's resilience in the face of disruptions to the electricity grid. However, while battery prices are falling rapidly, the additional cost remains a major drawback for many customers.

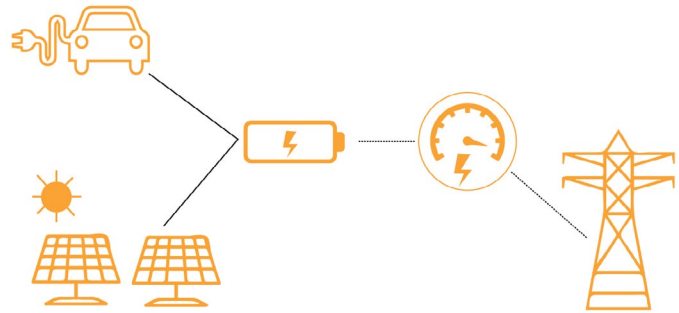


Figure 3: With storage

Suitability: Regardless of the level of charging, including storage as part of an integrated PV and EV system can make sense if a customer would like to store PV energy as it is produced and use it for EV charging when PV resources are not available (such as at night) or when grid energy is more expensive. In cases where charging occurs primarily during the day, such as at workplaces and public locations, storage may not be necessary. Battery storage systems may also help owners get through certain utility power outages if the system was designed that way. However, the load required for EV charging may be substantial enough that charging EVs during such an outage may compromise the ability of the system to generate enough electricity to meet the building's needs throughout the entire outage.

Example: Property owners can purchase battery storage systems that store PV energy and can be integrated with EV charging. Another example is a type of solar PV canopy unit that has battery storage integrated within it. This technology has been piloted in public charging settings by municipalities and other customers but has not yet been deployed at any scale. A unique benefit of such a product is that it can eliminate interconnection costs and, in some configurations, may be moved easily from location to location. However, it currently tends to be relatively expensive and may have limitations if the solar resource on-site is too variable.

METERED SEPARATELY

Description: Customers can elect to meter PV and EV charging separately. In some cases, utilities may require or encourage customers to meter separately in order to qualify for an EV-specific electric rate. A benefit of metering separately is that rates can be tailored to the specific end uses they serve, allowing customers to navigate costs more easily. However, installing an additional meter and electric panel can add extra cost to a project's bottom line.

Suitability: A configuration in which PV and EV charging are metered separately can be applied to any level of EV charging and is predominantly determined by how customers would like to manage their costs and applicable utility requirements. Separate metering is well suited for applications where a customer needs to allocate costs incurred by EV charging separately from other operational costs (e.g., workplaces, public charging locations, and places where consumption data could help the site host determine how to bill users for charging).

Example: Utilities such as Pacific Gas and Electric in California, Dominion Energy in Virginia, and DTE Energy in Michigan offer EV time-of-use rate plans that require the EV charging load to be metered separately in order to qualify for the special rates.²

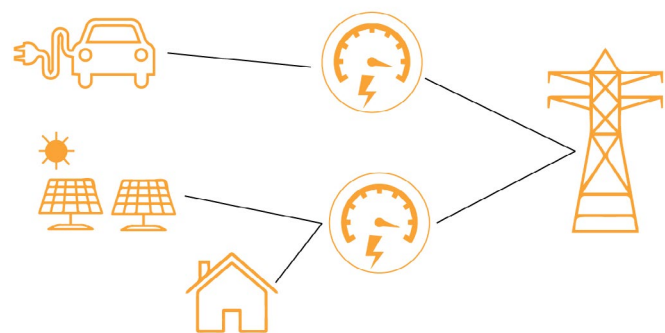


Figure 4: Metered Separately



Source: Fotolio

Virtual Configurations Across Different Sites

Physically co-locating PV and EV charging is not always necessary to capture simultaneous benefits. Another option is to create links between PV and EV systems across different sites.

HOW VIRTUAL CONFIGURATIONS WORK

Description: Technologies located at different sites can still be linked economically, depending on the regulatory context and available utility rates or tariffs. For instance, if virtual net metering is enabled ([see box, p 4](#)), a customer having properties at multiple locations, such as a local government, could allocate solar net metering credits from one site to cover EV charging loads at another. Community solar, which allows customers to lease or own shares of an offsite PV array, is another mechanism that can offset the cost of EV charging at the customer site.³

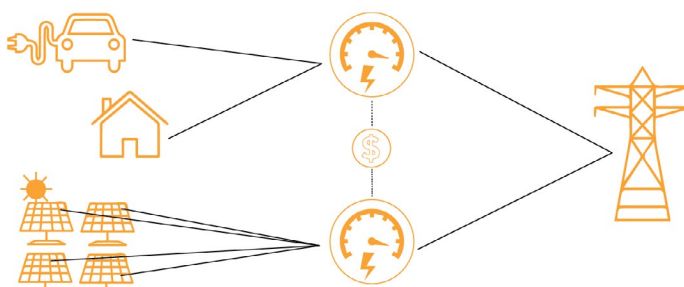


Figure 5: Metered independently or remotely sited

Suitability: Along with local government properties that have multiple locations, virtual configurations are normally used when it is not feasible to install PV on-site. For instance, multifamily unit residents, customers with inadequate roof space, tall buildings in urban environments, and renters or lessees may benefit from such an approach if they are located in areas that allow virtual net metering.

Example: Many community solar programs have been established throughout the U.S. For instance, Evergy (formerly Kansas City Power and Light Company) maintains a solar subscription service within its Kansas Central service territory, which enables customers to purchase clean power shares without the cost of panel installation and maintenance fees. Just as with any other community solar program, EV charging load could be offset with the subscription.⁴



Source: Kelly Bragg, West Virginia Clean Cities, NREL

Local Government Impact Levers

Local governments' opportunities to promote the synergy between PV and EV can be grouped into five categories: (1) education and outreach; (2) group purchase campaigns; (3) public actions and investment; (4) incentives; and (5) regulations. Each impact lever is described below, including factors and examples for local governments

to consider as they evaluate which actions to pursue in their own communities. Through no-cost consultations and technical assistance, the SolSmart program can help local governments determine the best ways to use these levers to influence PV and EV integration.

Achieving SolSmart Designation Using PV and EV Integration

Promoting the integration of PV and EVs can result in significant benefits to the community, from saving money to reducing pollution. Communities that take these actions can receive credit toward designation under the SolSmart program. Integration of solar PV and EVs can support achievement of SolSmart designation under the following credits:

- MDF-10a: Conduct feasibility analysis for solar PV integrated with other technologies such as combined heat and power or electric vehicle charging on/at a local government facility.
- MDF-10b: Install solar PV integrated with other technologies such as combined heat and power or electric vehicle charging on/at a local government facility.

For more information about how the SolSmart program can help communities meet their solar and EV charging objectives, visit [SolSmart.org](https://www.solsmart.org). As an additional resource, a SolSmart webinar on PV and EV integration geared toward local governments is available at <https://www.solsmart.org/resources/upcoming-webinar-7-31-what-local-governments-need-to-know-coordinating-efforts-on-solar-pv-and-electric-vehicles/>.⁵

Education and Outreach

Local governments can educate community members and facilitate outreach to help them better understand the opportunities and benefits of integrating PV and EVs. Early PV adopters may also be early EV adopters, so a coordinated education and outreach approach can save staff time and utilize existing channels more thoroughly. Furthermore, community members may see a better payback if they complete their

solar and EVSE projects concurrently and size their solar systems to be appropriate for their load, inclusive of EVs. As part of, or in addition to, the approaches featured below, local governments can use community events to cross-promote PV and EVs. Events where staff provide educational materials about one of the technologies could be enhanced with the inclusion of information or an on-hand expert to discuss the other.

Combined PV and EV Information Clearinghouse

By combining PV and EV information into a single clearinghouse, local governments can provide a one-stop-shop for guidance on both processes. In order to provide the most value, a clearinghouse should make it easy for residents, business owners, PV and EVSE project developers, and other community members to find information most relevant to them. If hosted on a website, a useful way to structure the information is to first articulate why the local government is invested in promoting PV and EVs together, then provide guidance for each target audience. The website can also include frequently asked questions and other resources where community members can get more details. Many local governments may already have information on PV and EVs hosted separately on their websites, so implementing this action would be a matter of providing resources about the intersection of the technologies. Lastly, local governments can link to existing tools, calculators, and templates instead of having to create these resources themselves. Creating an information clearinghouse can be a low-cost, low-effort way to encourage community members to consider the two technologies together.

Examples of the types of information local governments should consider incorporating into a PV and EV clearinghouse include:

- Available financing and incentive opportunities.
- Ways to estimate greenhouse gas emissions reduction and pollution reduction.
- Ways to calculate cost savings.
- A list of products tailored for PV and EV integration.
- A list of local installers, including those that can cover both PV and EVSE.
- Consumer protection resources such as guidance on how to select an installer, and what to expect from them.
- Comparisons of available utility rates.
- Planning considerations, such as (1) how large of a PV array to install based on existing electric usage from the building plus anticipated EV consumption; (2) optimal times to charge an EV based on utility rates, net metering policy, and amount of PV generation; and (3) descriptions of types of products that may be of interest, like inverters that also come with an EV charging function and software tools/apps for managing PV and EV adoption.
- Guidance on future-proofing installations, such as by using microinverters so additional PV capacity can be added in the future.
- Zoning and permitting information.

SolSmart has template language for solar web pages available on request. For any municipality that participates in the SolSmart program, SolSmart can also provide further input on what a combined PV and EV clearinghouse website could look like.

Solarize Massachusetts Plus Program

The **Solarize Mass Plus** program provides a combined information clearinghouse that shows the complementarity of PV and EV technologies in terms of fuel cost savings, and identifies incentives that are available to fund their integration. On the website, see the section “Program Background: Solarize Mass Resources Toolkit.”⁶



Source: Fotolio

Tailored Information and Guidance for Sites Developing PV and EV Charging

Local governments can provide information about PV and EVSE integration to potential hosts for both technologies, such as workplaces, multi-unit dwellings, school districts, transit agencies, or popular destinations. Useful information to convey includes guidance on local permitting processes, considerations for siting infrastructure, costs associated with installation and operation, and ways to address anticipated challenges. Some host locations are ideal for daytime EV charging when there is ample PV production. For example, workplaces and schools have ample opportunity for daytime charging, as most vehicles are parked on-site for long periods during the day. Local governments can provide guidance to these audiences on how to take advantage of these opportunities and provide their students and/or workforce with a desirable benefit, while enhancing their public image and advancing sustainability goals.

Policy guidance

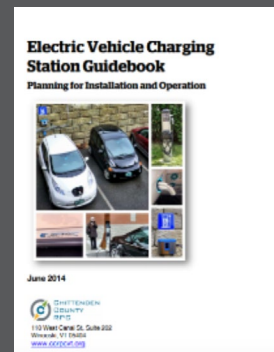
Local governments can publish guidance covering pricing policies, parking policies, and demand charge management approaches. Guidance could be provided for internal local government audiences, as well as site hosts that would install PV and charging on their own facilities and campuses.

Pricing policy guidance could include information on:

- Which pricing mechanisms for EV charging are allowable under state regulations. (For example, Massachusetts requires that public charging should not necessitate membership in any charging network or charge a subscription fee, and all chargers should be accessible by credit card payment.⁸⁾)
- How to evaluate the upfront and ongoing cost of installing PV and EV charging at the same site, and how to set rates for users of the chargers that are reasonable (e.g., helping the site host recover costs with rates that are not so high as to discourage use).
- Systems to manage free EV charging if it is provided as a perk.
- Managing the tension between (1) providing ample and inexpensive public charging as a method to advance the local market for EVs and (2) ensuring that EV

Chittenden County Guidebook

Chittenden County in Vermont developed an **EV Charging Station Guidebook** that includes information about the benefits of pairing EV charging with PV and provides installation and operation guidance to potential hosts.⁷



charging strategies do not disproportionately benefit wealthier constituents while leaving behind the less well off. Since many early adopters of EVs have tended to be more affluent, providing free or highly subsidized charging can raise concerns about whether subsidizing the cost of charging is a fair way to invest public money.

Parking policy guidance could include suggestions on:

- Etiquette, including encouraging EV owners to move vehicles when fully charged and notifying them of state of charge status if possible.
- Enforcement, including when to tow or fine vehicles that should not be occupying the charger parking spot, like a gasoline vehicle or an EV that has occupied the space for a longer time period than permitted.

Finally, demand charge management guidance is important for site hosts that expect a large volume of vehicles to charge or that expect to offer Level 2 or DCFC charging. Particularly given that solar power is intermittent, site hosts could expect substantial spikes in demand, for instance, if a rainy day coincides with heavy usage of the charging ports. Many utilities and EV charging providers are providing options for modulating the charging of EVs in a way to limit exposure to demand charges.

Multifamily and rental building guidance

For some potential hosts, particularly rental properties, multifamily buildings, condos, and other real estate with short-term occupancy, both PV and EV charging face the classic “split incentive” challenge. The split incentive is that the landlord is responsible for covering upfront costs, but tenants benefit from reduced utility bills and/or the opportunity to charge their cars. Local governments can assist these entities by identifying the challenges and providing them with potential mitigation strategies and assistance.

Several local governments have provided resources and guidance to help entities facing these unique challenges. To date, however, most guidance documents have addressed solar PV and EV charging separately. For example, through its Sunny Cambridge initiative, the City of Cambridge, Massachusetts (**SolSmart Gold**) developed a **step-by-step guide for landlords and condominium owners** to walk them through the process of installing rooftop PV. The guide also provides resources about eligibility for tax credits.⁹

The San Diego Association of Governments developed a **guidance document for multi-unit dwellings** that focuses on EV charging, which includes discussions on challenges and common solutions.¹⁰ While these documents are both useful, local governments could consider combining information about both technologies to help address related barriers concurrently, and potentially encourage hosts to install PV and EV charging at the same time.

Local governments do not have to develop these resources from scratch. There are several host-specific guidance documents for PV and EV charging at the federal, state, and city levels that they can borrow from and customize with local information. Examples include the U.S. Department of Energy **best practices and case studies** for EV charging for multi-unit dwellings, the **Multifamily Housing Charging Station Installation Handbook** from Plug-In North Carolina, the **Solar Guide for Condominium Owners and Associations in Massachusetts** from the Massachusetts Department of Energy Resources, and the **New York City Multifamily Solar Guide**.¹¹

Solar and EV Group Buys

Local governments can organize group buys, which leverage participant numbers to increase negotiating power and secure group purchase discounts. Group buys can be organized to purchase PV, EVSEs, and/or EVs. The role of a local government when leading a group buy is to negotiate discounts, coordinate marketing and outreach campaigns, and educate residents about the benefits of the available technologies and the corresponding discounts. These programs are relatively inexpensive for local governments to run and can have significant impact. Group buy discounts can also be combined with state and federal tax credits and financial incentives to further reduce costs for consumers. As examples, successful multi-year campaigns that offer both EVs and PV have been run in the Front Range in Colorado and the Bay Area in California.¹²



Source: Fotolio

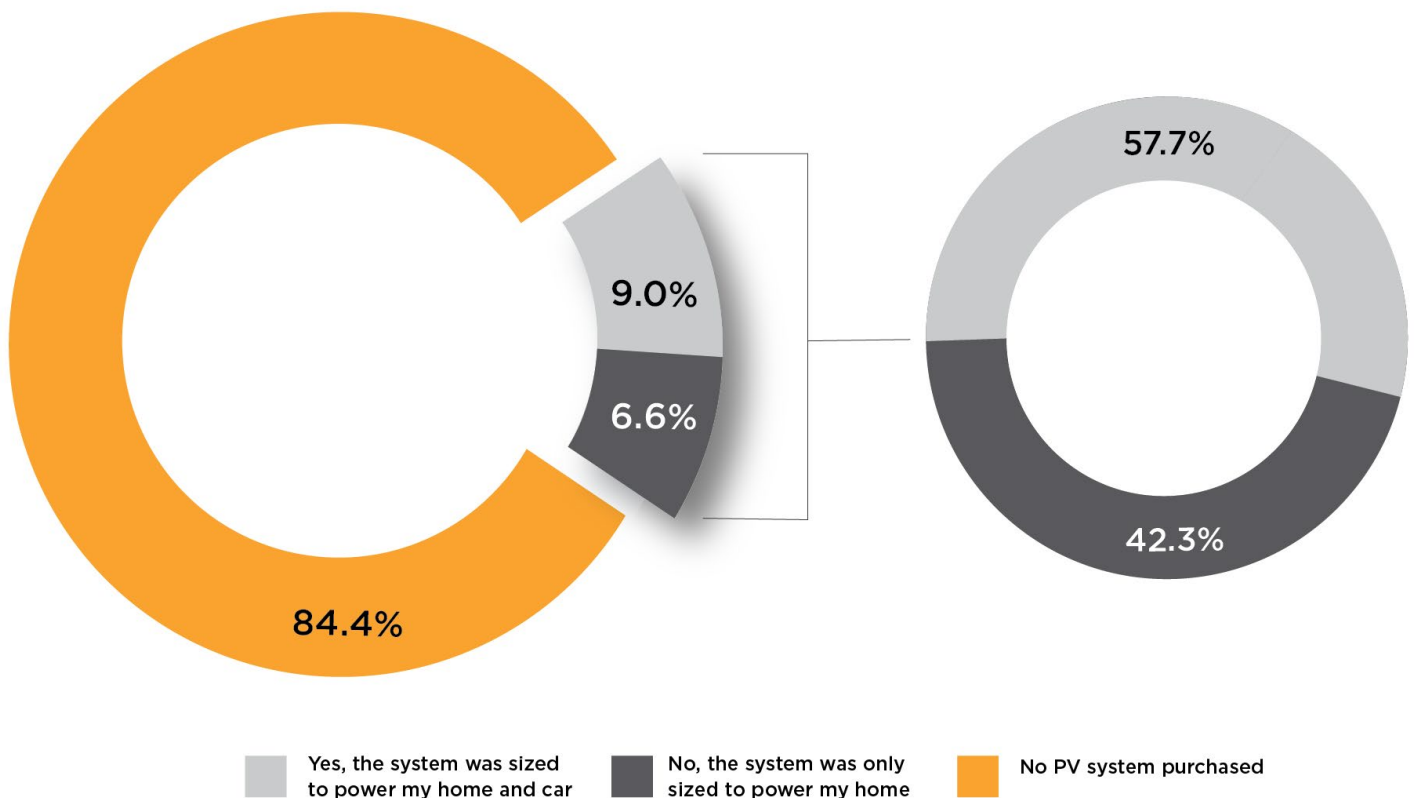
SOLAR BENEFITS COLORADO

In 2015, Boulder County (**SolSmart Silver**) led Solar Benefits Colorado, the first combined PV and EV group purchase program. Residents of Boulder, Adams, and Denver counties could purchase both an electric vehicle and a rooftop solar array at a discount. Boulder County worked with a local Nissan dealership to offer an \$8,349 group discount for the 2015 Nissan LEAF. The net price of the LEAF was a 62% discount off the retail price when combined with state and federal tax credits.¹³ Of those that purchased an EV, only 28% were already considering doing so, indicating that the program brought in new customers.¹⁴ PV was available at a price of \$3.50 per watt with an incentive of \$250 or \$750 for each signed contract, depending on the dealer.¹⁵



By Aaron Turpen (11-04-15 10:20 AM) - 2/2/16
Solar Benefits Colorado Program Sees Nissan LEAF Sales Skyrocket

Although Boulder Nissan offered participants EV charging at its DCFC network for 24 months after purchase, EV chargers were not directly part of the group buy. In a post-program survey, participants suggested including charging stations as part of the program. According to program results, about 16% of participants who bought an EV also installed PV, and nearly 58% of the participants who did so sized their systems to handle both loads.¹⁶ The amount of overlap is promising, but also suggests the need for further education to help optimize participation in both components of the program.



Left: Percentage of EV purchasers who also installed solar PV. Right: System sizing decision among those who installed solar PV. Source: Mike Salisbury and Will Toor, *Evaluation of Colorado Electric Vehicle Group Purchase Programs*, Southwest Energy Efficiency Project, February 2016. Surveys were sent only to those who signed up for the EV portion of the Boulder County group purchase program, so there is no information about the percentage of PV purchasers who also purchased EVs. There was also no recorded information about EV purchasers who hired electricians to install Level 2 chargers.

Keys to a successful group buy include (1) providing limited-time offers to motivate participants, (2) focusing on a limited number of dealers, vendors, and products, and (3) implementing substantial stakeholder engagement upfront. The Southwest Energy Efficiency Project created [The Electric Vehicle and Photovoltaic Power Purchase Handbook](#) as a toolkit for developing coordinated EV and rooftop PV group buy programs.¹⁷ The Handbook includes discussion of the benefits of including PV in combination with EV discounts as part of a program. As the Handbook explains, a substantial number of participants choose to participate in discounted offers for both PV and EVs, due to the benefit of offsetting the electricity used by the purchased EVs with renewable energy. The Handbook also provides guidance on how to administer a program, sample language to use in requests for proposals (RFPs), and examples of outreach materials.[‡]

The Handbook also describes some challenges associated with conducting a joint campaign, particularly that it may add complexity to program development. Participants choosing to purchase solar panels, EVs, and charging systems need to make decisions about home energy improvements, mobility choices, and whether to install higher-powered (Level 2) charging. From the organizer perspective, doing a joint campaign requires two separate RFP processes to solicit PV installers and EV dealers, increased coordination and communication, and a robust customer tracking system. Local governments can work to mitigate these challenges by using existing templates for RFPs and other materials as much as possible and bringing in an outside administrator to manage the program.

Local governments may also consider incorporating a charging strategy as part of the program in addition to the vehicle purchases. For single-family homeowners with garage or driveway access, a group buy program could include an incentive for a Level 2 charger. For programs targeting tenants, residents of multifamily housing, and others without access to a driveway or garage, the program could consider ways to encourage charging infrastructure in shared and/or public locations. As part of Drive Electric Northern Colorado's EV group buy in 2015 (which did not include PV), all participants that purchased a Nissan LEAF received a Level 2 charger for free.[§]

Coordinated PV and EV group buys, particularly those that involve more support for EV charging, warrant additional engagement from stakeholders such as electricians and utilities. Although some solar installers will be able to cover the electrical upgrades for EV charging at the time of the install, many EV buyers may wait to decide whether they need an upgrade. Therefore, the local government might consider developing a list of qualified electricians through a procurement process, making it easier for group buy participants to install infrastructure during or after the campaign. Organizations such as Electric Vehicle Infrastructure Training Program ([EVITP](#)) provide training for electricians to ensure they understand the importance of load calculations and taking proper precautions for Level 2 installation, since an EVSE can be a sizable continuous load compared to other household loads. Selection of contractors could involve factors such as their participation in such trainings, experience, ability to scale quickly, ability to cover the whole community, and pricing.

[‡]RFPs are traditionally used by a program administrator (such as a local government, nonprofit, or other organization) to select EV dealers and/or PV installers that will offer a discount as part of the group buy based on factors such as best discount offered, financing options, and inventory availability. Program administrators can forgo the RFP process by negotiating directly with vendors, though this is often done as part of a second round when vendors were already selected via RFP for the first round or when the number of vendors is limited.

[§]Not all residents will choose to upgrade to a Level 2 charger, as the upgrade often requires more electrical work than simply relying on an existing wall outlet for Level 1 charging. The motivation to upgrade to Level 2 at home is dependent on driving routines and availability of public or workplace charging, and if driving is modest (typically less than 20-40 miles per day), a Level 1 charger is likely sufficient.



Just as with any PV group buy, a coordinated PV and EV group purchase campaign may have implications for the utility serving the participants. The utility may need to plan for a sudden uptick in PV interconnection requests, while also anticipating growth in the overnight EV charging load.[§] Solarize programs have run into hurdles when they have attracted participants in particularly constrained grid locations, leading to a larger percentage of interconnection delays and/or denied interconnection applications. For that reason, advance planning and coordination with the utility is very important.

For additional information on solar group buys, consult the recorded [SolSmart webinar: How to Conduct a Solarize Campaign](#). Further information can be found in the [Market Development and Finance section of SolSmart's Toolkit for Local Governments](#). For a complete list of resources from SolSmart, see [Additional Resources](#), p 20.

Public Actions and Investment

Government actors can lead by example. Local governments are not only governing bodies, but also serve as workplaces, landlords, and consumers. They can save money and/or provide amenities for their constituents by integrating PV and EV infrastructure, and they will often get the most benefit from synchronizing the two investments. Demonstrating leadership at the local government level can encourage residents and private sector actors to follow suit.

Leading by Example

Given that initiatives taken at the local level can be highly visible to constituents, municipal governments are in a unique position to lead by example. Municipalities can adopt both PV and public EV charging together, particularly in highly trafficked central locations like libraries, parking garages, civic centers, and more. When installing EV charging at these locations, local governments will need to decide whether they should be dedicated to public access, municipal fleet use, or some combination of both.[‡] Offering public access can leave a positive impression that the community has a wide network of public charging locations, particularly if the destination is highly trafficked. On the other hand, dedicating the EV charging to municipal fleets can enable the local government to directly capture any cost savings associated with the PV system, and can potentially enable a lower cost

per mile for fleet vehicles. Whichever approach a community chooses, the commitment to PV and EV can be formalized in a sustainable building policy, such as is the case in Saint Paul, Minnesota (see box).¹⁸

A second way in which local governments can integrate PV and EV charging is by integrating solar into their fleet transition plans. Common examples of municipal fleets that can be electrified include pooled employee vehicles, shuttles and vans, and pickup and work trucks (which are primed to have many more makes and models available in the next few years). Sometimes, the local government may have control or influence over other fleets as well, such as transit bus fleets and/or school buses, which both provide excellent opportunities for PV and bus electrification. In cases where municipal governments do not have control over such fleets, they can still share best practice examples, which can be found in SolSmart's [webinar on solar and bus electrification](#).¹⁹ With their speed and performance capabilities, EVs are also beginning to be deployed as police cruisers.

SUSTAINABLE BUILDING POLICY



The city of Saint Paul, Minnesota ([SolSmart Gold](#)) has articulated its commitment to PV and electric vehicles as part of its [sustainable building policy](#). In cases where Saint Paul is a financial participant in the development process and where public investment exceeds \$200k, the local government requires that new developments are built to the highest green standards, which could include installing EV charging infrastructure and having on-site PV.²⁰

[‡]Combining public access and municipal fleet access in one location can run up against significant barriers. For example, fleets need reliable charging access and governments need to come up with an approach for payment allocation. However, it is a concept that has been gaining interest as local governments start to explore how they can maximize the value of their PV and EV assets.

[§]Assuming a substantial percentage of participants are those who work outside of the home and whose vehicles are not frequently garaged at home during the day.



Source: Fotolio

In certain cases, local governments can even establish microgrids powered by PV and use some of the power to charge EVs. Microgrids that can be “islanded” or shut off from the rest of the grid can increase energy security for the users of the microgrid in the event of a blackout. However, undertaking a microgrid project involves substantial complexity, cost, and stakeholder coordination, such that the value proposition does not always pencil out. In-depth feasibility studies and utility coordination are required if local governments choose to go this route.

To amplify the benefits of “lead by example” initiatives for PV and EV deployment, municipal governments should consider tracking their progress, documenting lessons learned, promoting success metrics like reduced operational costs, and presenting their policy solutions, so that public and private fleets can plan their own deployments with the benefit of learning from the local government’s experience.

Incentives

Local governments can offer incentives, both financial and non-financial, to encourage the private sector and residents to integrate PV and EVs.

Financial Incentives

Local governments have the ability to offer financial incentives and/or financing to offset the cost of PV and EV charger installation. Given that there are often other entities providing financial incentives for both PV and EV (e.g., federal, state, and utility incentives), and since many local governments have opted to focus more on policy mechanisms than on direct investment in subsidies, this report will not dive deeply into financial incentives that can be offered by the local government. Nonetheless, it is worth noting a few actions that municipalities have employed, either through direct financial incentives or through financing.

- **Property assessed clean energy financing (PACE).** Where authorized by state law, PACE enables building owners to take on debt that is repaid through an assessment on their property tax bills, and this debt is typically transferred when the property is sold. Subject to state guidance, it can be applied to both PV and EV charging separately. California, Minnesota, and Rhode Island are among the states in which either residential PACE or commercial PACE guidelines explicitly enable using PACE for EV charging.²² The cities of Pleasant Hill and Redlands in California both explicitly allow EVSE to be financed in this way.²³ However, the application of PACE to EV charging comes with some potential drawbacks.[‡] There does not appear to be any reason that PACE programs would need to be customized to address both PV and EV charging, since both technologies can be financed through PACE in certain states.

Berkeley Energy Assurance Transportation (BEAT) Project



The **BEAT microgrid project** in Berkeley, California (**SolSmart Gold**) explored how to design a clean energy microgrid to serve key municipal buildings and to improve community resilience. In conjunction with the project, the city rebuilt its Center Street Garage to be “microgrid ready” and include over 100 kW of PV and 20 EV chargers, with potential for expansion.²¹

[‡]Since EV charging leads to savings at the pump and on vehicle maintenance (neither of which are savings associated with the building in which charging is installed), and since future purchasers of the property may not own EVs, it could be less likely that the future owner of the property would benefit in the same way that they would for a more conventional use of PACE like energy efficiency, water efficiency, or solar improvements.

- **Permit fee waivers or reduced permit fee levels.** Local governments can encourage PV projects and/or EVSE installations by reducing or waiving the permit fee (either across the board or for certain property owner types like nonprofits, governments, or organizations providing services to the community). One possibility is that if a joint PV/EVSE application is allowed (see [Permitting Processes, p 19](#)), the applicant could be responsible for a single permit fee instead of paying a separate fee for each permit.
- **Rebates for purchasers and/or property tax credits for organizations that install PV and EV charging.** As noted above, other levels of government provide tax credit or rebate incentives for PV, EV, and EVSE to support personal/at-home adoption and to support adoption in a corporate, organizational, or public setting. Most municipalities have shied away from adding another layer of incentives. However, sometimes municipal utilities, as opposed to the local governments, will offer incentives for PV adoption and/or EV adoption. At the time of writing, there are no known examples of special incentive adders for property owners who concurrently install PV and EV charging, though many municipal utilities support PV, EV charging, or both separately. Likewise, local governments can also provide tax incentives for businesses that install EV charging for use by employees, customers, and visitors.

Non-Financial Incentives

Municipalities should consider non-financial incentives as well. In particular, they can make it easier and faster for developers to incorporate PV and EV charging. For example, municipalities can allow additional bonus density or reduce parking minimums for buildings integrating PV and EVSE. Precedent exists for municipalities counting EV charging spaces as double toward any minimum parking requirements,

so a broader policy to provide a higher multiplier for PV canopies could be enacted.

Local governments can consider expediting permitting of development projects that include innovative sustainability actions such as installing PV and EV charging together (see [Regulations, below](#)). For many project developers, time is money. A speedier approval process is an extremely valuable incentive that could motivate them to take action. Such incentives would need to be carefully evaluated within the legal setting where the jurisdiction operates and would also need to be balanced with many other policy priorities.



Source: Fotolio

Regulations

While local governments must operate within the confines of the regulatory frameworks established at higher levels of government (e.g., they cannot regulate fuel economy and EV ownership), they do have several regulatory mechanisms at their disposal. These include building codes, zoning ordinances, and the implementation of permitting and inspection processes. While this report is focused on how to encourage PV and EV charging together, local governments must still be thoughtful in how they shape regulations to avoid unintended consequences. For example, requiring that PV and EV be paired in all cases may deter property owners from installing any EV chargers if they are in a location with limited solar exposure. As another example, solar arrays have long lifespans, so providing regulations or incentives to push property owners to install solar canopies and charging on parking lots could be counterproductive if the long-term plan for that land is something other than parking.

Local governments should find a balance between the “carrot” of incentivizing behavior and the “stick” of enforcing requirements, in order to encourage PV and EV integration in cases where it provides the most benefit.

ARLINGTON GREEN BUILDING BONUS DENSITY



Through the **Green Building Bonus Density program** in Arlington County, Virginia (**SolSmart Bronze**), project teams working on new development can request additional bonus density and/or height if they meet Leadership in Energy and Environmental Design (LEED) certification requirements. Although the program does not explicitly require EVSE or PV, both technologies can contribute to achieving LEED certification.²⁴

Building Code Requirements

Building codes present a powerful opportunity to encourage both PV and EV charging, since they apply to all building construction including major renovations. However, not all local governments are authorized to adopt codes that go beyond their state's building codes. Those that are often obtain this authority by virtue of being in a state that allows "stretch" or "reach" codes, which are more advanced than those required by the state. Many jurisdictions already require new construction to be either PV-ready or EV-ready, meaning the electrical infrastructure must be in place to support future installation of the technologies. Synchronizing the two can be a natural next step. San Diego County (**SolSmart Gold**) includes language in its **building code** that all new residential construction must include sufficient capacity and space for future PV and EV charging systems on the main electrical service panel. Furthermore, the county requires conduit and electrical junction boxes that are sufficient for future installation of wiring and equipment associated with PV and EV charging.²⁵

For renovation of existing buildings, additional nuance is needed to determine when code requirements for PV and/or EV charging make sense. Local governments can consider instituting conditions that would trigger EV charging installation, such as when a parking lot renovation is planned.

Zoning Code Requirements

Zoning codes are another mechanism through which local governments can influence the integration of PV and EV, both through regulation of primary and accessory uses and through parking standards. While building codes apply universally, zoning codes can be customized to be appropriate to each land use classification within a municipality, enabling more stringent requirements in some zones and more permissive requirements in other zones.

Allowing small, standard installations "by-right" is a gold standard for reducing unnecessary barriers to both PV and EV charging. By defining the types of PV installations and the types of EV charging installations that qualify by-right, municipalities can ensure that discretion is removed from the process of obtaining a permit and that all potential installations are held to the same objective standards, rather than requiring conditional permits, special use permits, or variances. Solar canopies are a great example of the type of integrated PV and EV charging that could be allowed by-right, subject to specific dimensional requirements. To this end, the Great Plains Institute's **Local Government Solar Toolkit** provides model ordinance language that includes PV canopies as permitted accessory uses, which could be used for EV charging. The model language also specifies that PV canopies are an allowed use whether or not they are on the

same lot as the building.²⁶ The City of Cumberland, Rhode Island facilitates the development of solar canopies on parking lots by creating a definition for "Solar Energy System, Covered Parking" (**Zoning Ordinance 17-01**). This definition includes distinctions between minor, medium, or major-scale canopies, permitting minor and medium-scale canopy systems under the same zoning requirements as similarly sized ground- or roof-mounted systems.

Local governments can institute parking standards requiring parking lots to be equipped with the necessary electrical infrastructure to support both future charging stations and solar parking canopies. They can also consider how to adapt parking minimums to incentivize or at least not deter the inclusion of PV and/or EV charging. In October 2019, California changed its **vehicle code** to state that a parking space with existing or future EV charging equipment will count as at least one standard parking space for the purpose of complying with minimum parking space requirements, and a handicap-accessible space meeting the same parameters will count as two. Prior to the change, some local governments required developers to build parking spaces in addition to those with EV charging equipment in order to comply with minimum parking requirements. Some local governments now go beyond the requirements of the state vehicle code and count any EV charging parking spot as multiple parking spots, which can be a valuable incentive for developers. Examples within California include the counties of Los Angeles, Sonoma, and Sacramento, and the cities of Stockton, West Hollywood, Santa Barbara, and Pleasanton. In a similar vein, local governments could count parking spots equipped with both PV and EV charging as multiple spots.



Source: Fotolio



Source: Fotolio

Permitting Processes

Local governments can streamline permitting processes to support PV and EVSE integration. This can be done by fast-tracking projects with both technologies ([see Non-Financial Incentives, p 17](#)) or by offering a combined permit application or inspection. While a number of communities offer expedited permitting for PV and EVSE, the two permits are typically offered separately. For example, the City of Piedmont, California offers two separate permits with identical processing times.²⁷ The only difference lies with the fees. However, given that many elements of the permitting processes are similar, such as electrical requirements, site inspections, and processing times, combining them into a single application is a highly feasible option.

SolSmart has published a Simplified Solar Permitting Guide that provides [step-by-step instructions](#) for local governments seeking to develop simplified permitting processes for PV. Although it does not specifically address EV charger installations, the guidance can serve as a starting point for developing a streamlined permitting process for PV and EV combined. SolSmart has also been a leader in the [Solar Automated Permit Processing \(SolarAPP\)](#) initiative. In coordination with the National Renewable Energy Laboratory, The Solar Foundation, the Solar Energy Industries Association, national solar installation companies, code

officials, and other stakeholders, SolarAPP has developed an online permit portal for local jurisdictions that automatically reviews project applications for compliance with model building, electrical, and fire codes, and instantaneously issues permits for compliant systems. Initially designed for roof-mounted residential PV, the SolarAPP platform will be expanded to include other clean energy technologies including storage and EVSEs.

Additional information on streamlining local permitting processes is available in the [Codes, Permitting, and Inspection chapter of SolSmart's Toolkit for Local Governments](#).

SUSTAINABLE BUILDING POLICY



Morgan Hill, California has a [single combined permit](#) for PV and EV that can be submitted online, rather than having two separate permits and inspections.²⁸



Additional Resources

In considering strategies for integrating solar PV and EV infrastructure, local governments are encouraged to consult these other resources, all of which are available on SolSmart's website at [SolSmart.org](https://www.solsmart.org).

SolSmart Webinar: Solar and Electric Vehicle Best Practices for Local Governments

This webinar provides additional information and resources for local governments on the co-development and integration of solar PV and EVs.

Issue Brief: Solar and Electrification: A Beneficial Partnership

This guide explains how communities can collaborate with their utilities on programs that produce complementary benefits for solar and electrification policies.

Issue Brief: Expanding Solar Participation Through Community Solar

This guide describes the community solar model and highlights options for developing new projects.

SolSmart Webinar: How to Develop a Solarize Campaign

This webinar covers the basics of how to develop a solar group purchase campaign, featuring national experts as well as case studies.

Solar Energy: SolSmart's Toolkit for Local Governments

This comprehensive guide for local governments includes detailed sections on permitting, planning and zoning, community solar, and market development and finance, among other topics.



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TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Items/Unfinished Items

MEETING DATE:

August 25, 2020

ITEM #: 6d**ITEM TITLE:**

Community Development & Housing Analysis Report

DESCRIPTION:

In accordance with various plans, Sharon Williams, Community Development Director has drafted the attached report to begin a conversation with Town Council on “Community Development & Housing” goals for the Town of Altavista. [\(LINK\)](#) A list of the 9 recommendations listed in the plan are attached. [\(LINK\)](#) Staff would ask Town Council to review the report over the next couple of weeks and a more in-depth discussion can be scheduled for a future meeting.

RECOMMENDATION:

Take the report under advisement and schedule a time for additional review/discussion.

BUDGET/FUNDING:

N/A at this time.

POTENTIAL ACTION:

- Per Council’s discussion:
 - Receive report for review and schedule additional discussion at a future meeting.
 - Take No Action.

ATTACHMENTS:

- FY2020 Community Development & Housing Analysis report (draft) [\(LINK\)](#)
- Synopsis of Plan Recommendations (draft) [\(LINK\)](#)



Community Development & Housing Analysis

**Prepared by Sharon D. Williams, AICP –
Community Development Director
August 10, 2020**

2020 Housing & Community Development Report

Altavista, Virginia is a unique town, rich in history. It has been considered a strategic place for transportation and commercial activities. In the early 2000's, the town experienced several losses that affected the financial position of the town. Deindustrialization reduced the number of available jobs and many families moved in search of jobs and new housing.

Because of these losses, Altavista's once thriving economy became stagnant. Since then, the town has not been able to fully regain the economic status it once had. Recent statistics show Altavista to have a median household income and median house value below state average, an unemployment rate above state average.

This led the Town of Altavista to begin looking for ways to remedy these poor statistics and boost the speed and value of work being performed within its boundaries. As the town begins to examine its approach to housing related work, it must also consider its approach to funding efforts around housing, community development, and housing support services.

While beneficial to the community overall, it is important that the organizations involved in this work communicate, collaborate and cooperate with one another. As there are a limited number of resources, this cooperation will help ensure there are no competing priorities, duplication of efforts or uncoordinated flows of information.

The Town of Altavista realizes that community and economic progression may be sooner witnessed and more impactful with the collaboration of those organizations on the same projects. To encourage and enable this collaboration the town should be dedicated to convening housing stakeholders to discuss sustainable development opportunities for homeownership, mixed-use sites, and mixed-income communities. A community dialogue must occur, and partnerships must strengthen and solidify. Together we should create a collaborative approach to the revitalization of the Altavista's neighborhoods and creation of new spaces.

Reality Check – Housing: How Do We Improve the Quality of Life for the Citizens of Altavista?

The quality of housing in the town is directly related to the poverty in Altavista. It is important that Altavista convert renters into homeowners and that there is a variety of housing choices to attract younger people. The path to that progression includes entranceway improvements, town cleanup, expanded recreation opportunities, revival of the Vista Theater, the proposed visitor's center, the Incubator, Accelerator and Coworking Center and a new focus on culture and the arts downtown.

The town has begun the first step in this process by identifying key partners. Additional guidance is needed by the town to continue to define the role of each stakeholder and ensure that they are using available tools for the betterment of everyone in the community. The town will lead by educating citizens about available resources, actively pursue developers and work to ensure that the town's ordinances and plans are not barriers to development.

To be successful, the town will need to abandon its traditional way of thinking. What has been done in the past has not worked. Leaders also need to understand that the town is not a housing developer; therefore, if it wants to see additional and improved housing units it will need to provide the appropriate incentive packages to potential developers. In Fiscal Year 2021, Altavista will move toward its goal of strategically leveraging resources and promoting sustainable community

investment, business growth, affordable housing, regional planning, and workforce development. Vision, collaboration, innovation, and investment are needed to set the agenda for the next economy. The town must determine what the next level is for community and economic development in the region. It must understand the community's assets and realize how far the journey is to achieve the shared vision. Our town is prepared to take risk. Now it is time to find out what organizations and partners can bring capital and resources to the table.

Single-Family Dwellings

While there is a strong focus on economic development, the town must also attract those who commute to the town for work and commute out at the end of the day. While the town has an older housing stock, there are still opportunities for affordable home ownership and new construction. Per federal guidelines, for housing to be affordable, a household should not have to spend more than 30% of its annual income on shelter. If a family is stretched beyond that level, it is considered to be 'cost-burdened.'

This is a difficult proposition for many renters and homeowners in Altavista. Many households do not earn enough income to afford the town's average cost of rent or mortgage expense without incurring a cost burden.

As we work on economic development, we should also work on educating citizens about homeownership and improvements. There are a number of housing lenders that would work well in Altavista. They include:

Virginia Housing

Virginia Housing offers a variety of affordable home mortgages. All are 30-year fixed rate loans. Some do not require any down payment; some allow for lower credit scores; and some offer a Mortgage Credit Certificate (MCC) to help reduce federal taxes. Virginia Housing makes homeownership affordable through their "Virginia Housing Loan Combo," a down payment grant, plus an MCC (a federal tax credit for homebuyers). They also offer free homebuyers' classes. Virginia Housing loans have maximum income and sales price limits and/or loan limits, which vary according to where the home is located.

USDA Rural Development – Virginia

502 Loans

The Section 502 Guaranteed Loan Program assists approved lenders in providing low- and moderate-income households the opportunity to own adequate, modest, decent, safe and sanitary dwellings as their primary residence in eligible rural areas. Eligible applicants may purchase, build, rehabilitate, improve or relocate a dwelling in an eligible rural area with 100% financing. The program provides a 90% loan note guarantee to approved lenders in order to reduce the risk of extending 100% loans to eligible rural homebuyers – so no money down for those who qualify!

Town Snapshot

Population of Altavista: 3,442

Altavista area median income: \$34,659

MSA median income: \$52,076

Virginia median income: \$71,564

Altavista renter rate: 41%

Average monthly gross rent: \$683 +
Utilities = \$1,008

Average Rental Housing Burden: 34.9%

504 Loans

The 504 Loan and Grant Home Repair Program provides loans to very low-income homeowners to repair, improve or modernize their homes. They also provide grants to elderly low-income homeowners to remove health and safety hazards or to make it more accessible to a household member with a disability.

To qualify for the Section 504 Loan, the applicant must have a reliable income source sufficient to allow repayment of the loan as supported by a budget, which is defined as using a maximum Total Debt (TD) ratio of 46%. The applicant must be a homeowner, occupy the home, and be unable to obtain affordable credit elsewhere. They must have a household income below 50% of the area median income.

To qualify for a grant, the owner must be 62 or older and not be able to repay the repair loan.

Recommendation: Post a list of available resources to the Town's website to encourage homeownership,

Links: <https://www.vhda.com/Homebuyers/VHDAHomeLoans/Documents/Home-Loan-Options-ebook.pdf>

Single-Family Improvements

In addition to the repair loan/grant mentioned above, limited funding is available from the Virginia Department of Housing and Community Development. They include:

Emergency Home and Accessibility Repair Program

Emergency Home and Accessibility Repair Program (EHARP), which provides funds to remove urgent, emergency health and safety hazards. It also addresses physical accessibility barriers for low-income Virginians. Assistance from local administrators is available to occupants based on income on a first-come, first-served basis. An applicant's total gross household income from all sources cannot exceed 80 percent of area median income (AMI), adjusted for family size, which is currently determined by HUD. Homeowners and tenants (with homeowner written approval) are eligible to apply. The maximum assistance is \$4,000.

Administered: Lynchburg Community Action Group 915 Main Street, 2nd Floor Lynchburg, VA 24504

Weatherization Assistance Program (WAP)

The Weatherization Assistance Program (WAP) reduces household energy use through the installation of cost-effective energy savings measures, which also improve resident health and safety. Common measures including sealing air leaks, adding insulation, and repairing heating and cooling systems. WAP does not offer assistance with paying utility bills.

Administered: Lynchburg Community Action Group 915 Main Street, 2nd Floor Lynchburg, VA 24504

Recommendation: Educate citizens about programs that are currently available to help with renovations. When CDBG funds are available, the town might consider making an application and

creating a program for rehabilitation. It would be the town's benefit to identify a 501c3 to partner with on rehabilitation projects or at least identify the process the town would use.

The town could also work with a local contractor to occasionally offer "How To" clinics in town. It could be a way to provide extra work for a local contractor, as well as educate a homeowner on an easy fix they have neglected because they thought it was too expensive.

Downtown Renovations and use of Historic Rehabilitation Tax Credits

Downtown Altavista has historic structures. The preservation of historic buildings benefits communities and connects us to our heritage, enriching the quality of our lives in many tangible and intangible ways. Their preservation also provides demonstrable economic benefits.

Through the federal and state rehabilitation tax credit programs, property owners are given substantial incentives for private investment in preservation, resulting in enormous advantages to the public.

Both the federal and state tax credit programs are administered in Virginia through the Department of Historic Resources.

State tax credits are available for owner-occupied, as well as income-producing buildings. If a property is income-producing, the owner may also be able to take advantage of federal tax credits. Property owners could use historical tax credits to close the gap in funding a historical renovation.

Recommendation: While most properties have not sold since the historic designation in 2010, it might be beneficial to remind property owners that the program exists via direct mail and/or social media. While we are in a pandemic, this could be a tool owners could use in the future, as businesses restructure, reopen and/or try to attract new tenants.

Link: <https://www.dhr.virginia.gov/tax-credits/>

Preservation of Commercial Character

Downtown (DRO)

Altavista's downtown is the core of our community. The area is zoned C-2 (General Commercial). This zoning designation permits specific uses that are enumerated in the Zoning Ordinance. Residential uses are one of those uses that are permitted by-right, with some limitations. The Zoning Ordinance as currently written does mention that the downtown portion of C-2 properties are in an overlay district. Without a reference to the DRO Section 86-426, a permit might be approved in error that authorized a first-floor residential use.

That would be detrimental to our commercial frontages along major and even minor streets in the primary business/commercial corridor, which are Main St, Pittsylvania Ave, 5th St, Franklin Ave. Amherst Ave, Nelson Ave and 7th St.

Recommendation: Amend the Zoning Ordinance to make the DRO a standalone district versus an overlay district. Another option is to amend the Official Zoning Map to show the DRO portion of the C-2 district as a different color or hatched to signify that it is an overlay.

Commercially Zoned Residential Properties

There is no question that Main Street should be zoned commercial. However, the commercial designations outside of the Main Street corridor seems haphazard and not well thought out. At one point, the goal may have been to have existing homes on 3rd, 4th, 5th and 7th Streets converted to commercial uses. This has not occurred; therefore, the area may need to be rezoned to reflect its actual use.

Recommendation: Refer the matter to the Planning Commission for a recommendation on whether the C-2 zoning district should permit single-family dwellings as a by-right use. Staff recommendation would be that it should not and will continue to encourage the Planning Commission to consider if residential neighborhoods are appropriately zoned.

Multi-family Housing

Low-Income Housing Tax Credit Program

The Tax Reform Act of 1986 established the LIHTC to encourage private investment in affordable housing. More specifically, the LIHTC is a dollar-for-dollar reduction in tax liability to the owner of a qualified low-income housing development for the acquisition, rehabilitation (“rehab”), or construction of low-income rental housing units. The amount of credits allocated is based directly on the number of qualified low-income units that meet federal rent and income targeting requirements. To qualify for tax credits, a development must meet a number of conditions set forth in Section 42 of the Internal Revenue Code (IRC). In particular, the development must provide low-income housing units that meet certain occupancy and rent requirements. The developer of a residential rental development that qualifies for tax credits will typically establish a general partnership or limited liability company (LLC) to own the development. The developer usually assumes the role of Managing General Partner or Managing Member, retaining 0.01% of the ownership. The remaining 99.99% shares are sold to investors interested in using the tax credits to reduce their federal tax liability. The capital invested by the investor partner accounts for all or most of the development’s equity. This reduces the need for debt financing and thereby reduces the amount of the development’s annual debt service. While there is no direct rental subsidy to households under this program, the increased equity and reduced debt allows for lower rents than would otherwise be possible. Investors can claim these tax credits annually over a ten-year term, beginning with the tax year in which the development is placed in service or, at the owner’s election, the following tax year. States receive tax credits based on population, so the amount of available competitive 9 % credits in each state is limited. Most credits are allocated by the states during one or more competitive cycles held each year. Selection priorities and procedures vary in each state. While the LIHTC is a federal credit, the LIHTC program is administered by state housing finance agencies in each state. In Virginia, Virginia Housing (formerly VHDA) is responsible for administering the LIHTC program.

There are three types of low-income housing tax credits:

Type of Tax Credit	Description
9% credit	The 9% credit is determined on a ten-year, present value calculation of 70% of the qualified basis of the low-income units for new construction or substantial rehab of developments not federally subsidized or financed with tax-exempt bonds.
4% for New Construction or Substantial Rehab	The 4% credit is available to new construction and substantial rehab developments that are federally subsidized with tax-exempt bonds. This credit amount is determined by a present value calculation on 30% of the qualified basis over ten years.
4% for the Acquisition of Existing Developments	The 4% credit is also available for the acquisition of existing developments, if the development was not previously placed in service by the owner or a related party and is acquired at least 10 years after the later of (a) the date the development was last placed in service or (b) the date of the most recent non-qualified substantial improvements.

Unfortunately, due to its name, most people think LIHTC projects are Section 8 housing. This is not the case; however, it would not exclude someone who has a Section 8 Housing Choice Voucher. In my experience the program has enabled workforce rental units for professionals, such as teachers and police officers to be created. A project in Lynchburg to construct an 80-unit apartment complex on 24 acres was funded in Lynchburg during the 2020 cycle.

Applicants receive or lose points based on whether they can provide a locality support letter, zoning certification and a Plan of Development Certification from the locality. Prior to providing those letters, applicants would meet with the town to discuss the amenities and aesthetics of the proposed development. During those discussions, the town would also learn if the development would target a specific population such as the elderly or physically challenged.

Recommendation: Discuss the program with Town Council. If they support this type of development, the town can contact developers and ask that Altavista be considered. Virginia Housing publishes a list of experienced LIHTC developers in Virginia.

Link:

<https://www.vhda.com/BusinessPartners/MFDevelopers/LIHTCProgram/LowIncome%20Housing%20Tax%20Credit%20Program/2020%20Manual-%20FINAL.pdf>

Town Barriers to Development

Zoning

One option the town might consider is how it could attract a mixed-use developer. This type of development is characterized as pedestrian-friendly development that blends two or more residential, commercial, cultural, institutional, and/or industrial uses. Mixed use is one of the ten principles of Smart Growth, a planning strategy that seeks to foster community design and development that serves the economy, community, public health, and the environment.

While mixed use has become a popular buzz word, the term can be confusing. It is not just limited to a multi-story development that incorporates commercial use on the first floor with residential uses on upper floors. The Urban Land Institute's Mixed-Use Development Handbook characterizes mixed-use development as one that 1) provides three or more significant revenue-producing uses (such as retail/entertainment, office, residential, hotel, and/or civic/cultural/recreation), 2) fosters integration, density, and compatibility of land uses, and 3) creates a walkable community with uninterrupted pedestrian connections.

Mixed-use is three-dimensional. It is pedestrian-oriented places that layer compatible land uses, public amenities, and utilities together at various scales and intensities. This variety of uses allows for people to live, work, play and shop in one place, which then becomes a destination for people from other neighborhoods.

Mixed use developments are built on larger parcels of land. While there are vacant parcels in town, many are zoned residential, which would not permit a mixed-use development. A developer would need to apply to rezone the property to commercial or a Planned Unit Development (PUD).

Recommendation: Review the Zoning Map and Future Land Use Map to determine if changes should occur to attract developers.

Rezoning

Cost, Time, and No Guarantee:

Developers will typically look for properties that are already zoned for their desired use. One reason is the added development cost if the developer must apply for a rezoning. In addition to the application fees, a survey and development plans must be prepared to submit with the request. This adds to the overall development cost.

A developer might be more inclined to go through the rezoning process in a larger locality where there is a history of rezoning request being approved. Altavista, as a mostly developed locality, has not had a lot of rezoning requests. While we are receptive to new development, it may be difficult to find a developer willing to take the risk in terms of time and cost.

A rezoning request will typically take at least 90 days from submission to decision by the governing body. There are however some rezoning requests which will take longer. Chapter 527 of the 2006 Acts of Assembly added § 15.2-2222.1 to state law and directed VDOT to promulgate regulations to carry out the provisions of the statute. It now requires localities to submit comprehensive plans, plan amendments, and traffic impact analyses on certain rezoning proposals that will substantially affect transportation on state highways to VDOT for review and comment.

Traffic Impact Analysis:

Localities to Submit Certain Rezoning Proposals to VDOT for Review

§15.2-2222.1 of the Code of Virginia and the Traffic Impact Analysis Regulations, 24VAC30-155-40 (page 37), requires localities to send, within 10 business days of their receipt of a complete application, rezoning proposals that will substantially affect transportation on state highways to VDOT to review and provide comments on the transportation impacts of the proposal.

24VAC30-155-40.A provides the details for determining whether a rezoning proposal is required to be submitted to VDOT for review and comments. The details are summarized below.

Any rezoning proposal (for subdivisions, apartments, townhouses, commercial, office, mixed use developments, industrial, government facilities, etc.) will substantially affect transportation on state highways if it **meets or exceeds one or more of the following trip generation criteria**:

1. In a jurisdiction in which VDOT has maintenance responsibility for the secondary highway system, **a rezoning proposal that will generate more than 5,000 vehicle trips per day** at the site's connection to a state highway.
 - a. If the site does not have a direct entrance, the site's connection is where the road network, which the site uses for access, attaches to a state highway.
 - b. In cases where the site has multiple entrances to highways, volumes on all entrances shall be combined for the purposes of this determination.
2. In a jurisdiction in which VDOT does not have maintenance responsibility for the local highway system, **a rezoning proposal that generates more than 5,000 vehicle trips per day** and whose nearest property line is within 3,000 feet, measured along public roads or streets, of a connection to a state highway.
3. A residential rezoning proposal that meets the "low volume road submission" thresholds:
 - a. It generates more than **400 daily vehicle trips on a state highway** and,
 - b. Once the site generated trips are distributed to the receiving highway, the proposal's vehicle trips on the highway exceed the daily traffic volume such state highway presently carries according to the most recently published amount measured in the last traffic count conducted by VDOT or the locality on that highway.
 - c. In cases where the site has access to multiple highways, each receiving highway shall be evaluated individually for the purposes of this determination.

The rezoning proposal submittal threshold was established to target larger developments of a more regional scale for VDOT's review under the regulations.

A traffic impact analysis is a study which assesses the adequacy of the existing or future transportation infrastructure to accommodate additional trips generated by a proposed development, redevelopment or land rezoning. These studies vary in their range of detail and complexity depending on the type, size and location of the development.

These studies can be used to help evaluate whether the development is appropriate for a site and what type of transportation improvements may be necessary to maintain a satisfactory level of service.

Traffic impact studies are conducted in order to:

- Forecast additional traffic associated with new development
- Determine the improvements that are necessary to accommodate the new development
- Assist in land use decision making
- Identify potential problems with the proposed development which may influence development decisions

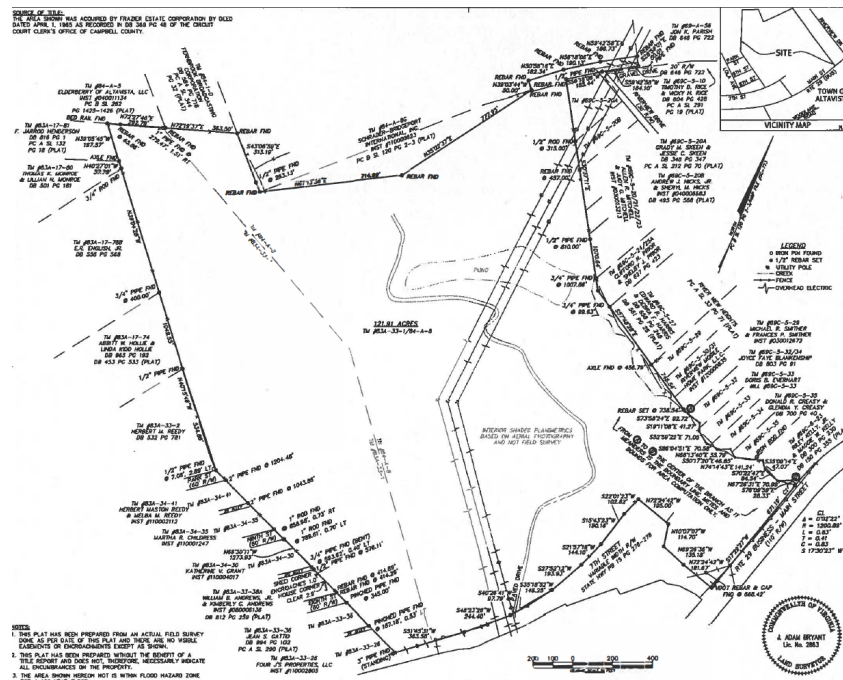
- Allow the community to assess impacts of a proposed development
- Help to ensure safe and reasonable traffic conditions on streets after the development is complete
- Reduce the negative impacts created by developments by helping to ensure that the transportation network can accommodate the development
- Protect the substantial community investment in the street system
- Recommend necessary geometric or operational improvements to the roadways

A developer would need to hire a traffic engineer to prepare the TIA. Part of that processes will be the creation of a Master Plan for the development. Typically, the highest and best use are selected. For discussion purposes a mixed use development on 100 acres is proposed below.

In a mixed-use development, it would be standard to see the types of uses listed below:

- Up to 300 multifamily dwelling units;
- 88,000 S.F. general retail;
- 28,000 S.F. grocery store;
- 148,000 S.F. discount club;
- Golf/entertainment facility with 30 hitting bays;
- Five (5) outparcels assumed as one (1) drive-in bank, two (2) fast-food restaurants with drive-throughs, one (1) high-turnover sit-down restaurant, and one (1) gas station with convenience market; and
- 50,000 S.F. office space

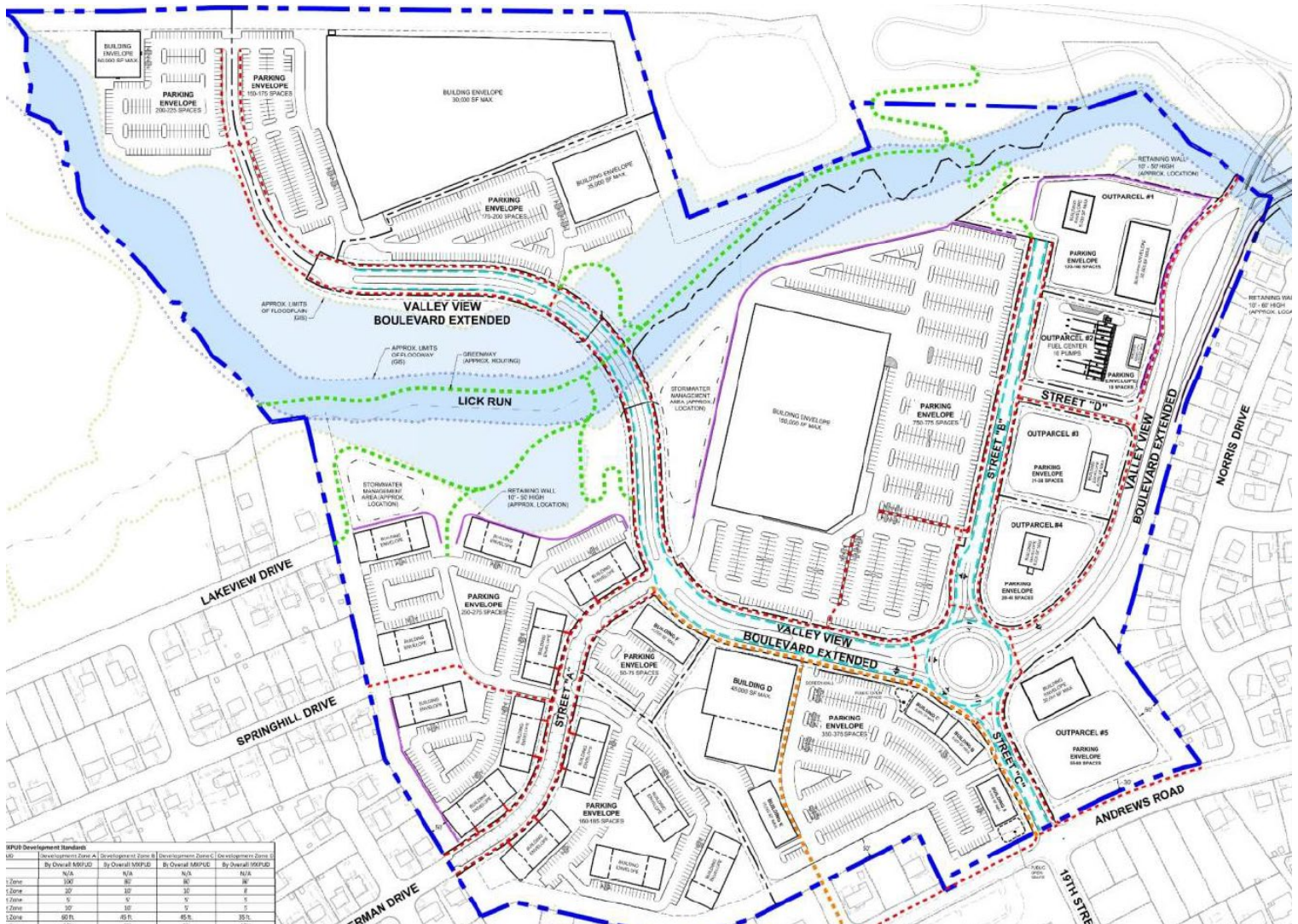
Plat of
Frazier
Estates
Corporation



The TIA process begins with a request for a scoping meeting between the developer, the developer's traffic engineer, VDOT and the locality. Unless otherwise directed, I would review the TIA for the town, based on the fact that I am a transportation planner and the town does not have a traffic engineer. A mixed-use development rezoning is going to generate over 5,000 ADT

Based on the site boundaries, it is anticipated that the following access points would be utilized/require study:

- Lola Avenue – new site entrance
- Lola Avenue/Main Street – existing signalized intersection
- 7th Street – new site entrance
- 7th Street/Main Street – existing signalized intersection
- Main Street – new site entrance opposite Town & Country Shopping Center
- Lynch Mill Road/Main Street – existing signalized intersection



The study takes approximately six (6) months to complete and will cost the developer around \$25,000. Once accepted by VDOT, the study is good for five (5) years.

Once the study is complete and accepted by all parties, the public hearings would be held before the Planning Commission and Town Council.

Recommendation: Educate Town Council about the time and cost that it can take for a rezoning. Explain that after the 10-month process, the developer then has to prepare plans and do site prep work before construction can begin.

Link: https://www.vdot.virginia.gov/projects/resources/TIA_Administrative_Guidelines.pdf

Blight

Blight is defined by the Code of Virginia as 'Any individual commercial, industrial or residential structure or improvement that endangers the public's health safety or welfare because the structure or improvement upon the property is dilapidated, deteriorated or violates minimum health and safety standards. Currently the town uses derelict structures and public nuisances. The Planning Commission is currently discussing if they will recommend to Town Council that the consider adopting a property maintenance code and hiring of a code official.

Staff will continue to monitor federal and state grantors for funding that would suit this purpose.

Incentives

What we have been doing is not working. While we can continue to say we want to address housing, I am not certain if the town has an incentive package that will entice developers wanting to build new single-family dwellings or mixed-use development.

It will be up to council to decide what incentives it will offer. I would recommend the town consider more than tap fees. It may want to have an approved TIA in hand for large sites. The town may want to offer to pay a percentage of the infrastructure, including construction of roads through a revenue sharing project with VDOT.

Revenue Sharing

VDOT administers this program, in cooperation with participating localities, under the authority of Section 33.2-357 of the Code of Virginia.

The Revenue Sharing Program provides additional funding for use by a county, city, or town to construct or improve the highway systems within such locality, with statutory limitations on the amount of state funds authorized per locality.

Funds can also be requested for eligible additions in certain counties of the commonwealth.

Locality funds are matched with state funds for qualifying projects.

An annual allocation of funds for this program is designated by the CTB.

Application for program funding must be made online by accessing the CTB's Smart Portal, where localities may make requests for VDOT funding programs electronically.

Additional supporting documentation, including a resolution in support of the application for the Revenue Sharing funding by the locality's governing body, as outlined in the Revenue Sharing guidelines, will be required.

Project administration may be done by VDOT or by the locality under an agreement with the Department.

Summary of Existing Funding Sources

Program	Benefits	Features
Fannie Mae (FNMA) HFA Preferred with Reduced Mortgage Insurance (MI) (Conventional)	<ul style="list-style-type: none"> ▪ Low 3% down payment required ▪ Affordable monthly payment ▪ Helps existing homebuyers “move up” ▪ As low as 1% down with Virginia Housing DPA Grant ▪ Could help to reduce existing mortgage payment 	<ul style="list-style-type: none"> ▪ 97% maximum financing ▪ Lowest mortgage insurance requirements ▪ Available for first-time and repeat buyers ▪ Eligible for Virginia Housing's Plus Second Mortgage. ▪ Eligible for Virginia Housing's Down Payment Assistance grant (DPA) (restrictions apply) ▪ Eligible for Mortgage Credit Certificate (MCC) (restrictions apply) ▪ Available for limited cash-out transactions as well as purchases
Fannie Mae 97% No Mortgage Insurance (MI)(Conventional)	<ul style="list-style-type: none"> ▪ Low 3% down payment required ▪ Affordable monthly payment ▪ Helps existing homebuyers “move up” ▪ As low as 1% down with Virginia Housing DPA Grant ▪ Could help to reduce existing mortgage payment ▪ Monthly payment is lower than other government/conventional loan programs 	<ul style="list-style-type: none"> ▪ 640 minimum credit score ▪ 97% maximum financing ▪ No monthly mortgage insurance requirement ▪ Available for first-time and repeat buyers ▪ Eligible for Virginia Housing's Plus Second Mortgage ▪ Eligible for Virginia Housing's Down Payment Assistance grant (DPA) (restrictions apply) ▪ Eligible for Mortgage Credit Certificate (MCC) (restrictions apply) ▪ Available for limited cash-out transactions as well as purchases ▪ Low payments can qualify for larger home ▪ 660 minimum credit score
FHA	<ul style="list-style-type: none"> ▪ FHA insured ▪ Low down payment ▪ Liberal credit qualifying ▪ As low as 1% down with Virginia Housing DPA Grant 	<ul style="list-style-type: none"> ▪ 3.5% down payment ▪ Credit Scores as low as 620 ▪ Eligible for Virginia Housing's Down Payment Assistance grant (DPA)

		<ul style="list-style-type: none"> ▪ Eligible for Virginia Housing's Plus Second Mortgage ▪ Eligible for Mortgage Credit Certificate (MCC)
VA (Veterans Administration)	<ul style="list-style-type: none"> ▪ VA guaranteed ▪ \$0 down payment required for eligible veterans ▪ Liberal credit qualifying 	<ul style="list-style-type: none"> ▪ 100% financing ▪ Credit scores as low as 620 ▪ Eligible for Virginia Housing's Closing Cost Assistance (CCA) grant ▪ Eligible for Mortgage Credit Certificate (MCC)
USDA (Rural Housing Service)	<ul style="list-style-type: none"> ▪ USDA guaranteed ▪ \$0 required for eligible rural properties ▪ Lower monthly payments 	<ul style="list-style-type: none"> ▪ 100% financing ▪ Low mortgage insurance ▪ Eligible for Virginia Housing's Closing Cost Assistance (CCA) grant ▪ Eligible for Mortgage Credit Certificate (MCC)
Virginia Housing Plus Second Mortgage	<ul style="list-style-type: none"> ▪ Eliminates funds needed for a down payment ▪ Helps to keep total mortgage payment affordable ▪ Could eliminate funds needed at closing ▪ Increases homeownership for first-time and specific repeat buyers ▪ Higher income limits assist buyers who don't qualify for grant funds ▪ Can be paired with Mortgage Credit Certificate (MCC) program 	<ul style="list-style-type: none"> ▪ 0% down payment ▪ 2nd mortgage is a 30-year fixed rate ▪ Qualified homebuyers can borrow 1.5% more than the sales price ▪ Eligible for first-time buyers and repeat buyers purchasing in Federal Targeted Areas ▪ Virginia Housing standard income limits apply ▪ First-time buyer required
Down Payment Assistance Grant (DPA)	<ul style="list-style-type: none"> ▪ Reduces funds needed for a Down Payment ▪ No repayment required ▪ Reduces monthly housing payment ▪ Can be paired with MCC 	<ul style="list-style-type: none"> ▪ 1% down payment ▪ Grant is a true gift ▪ Can be paired with other non-Virginia Housing down payment ▪ First-time buyer required

Closing Cost Assistance (CCA) Grant

- Could eliminate funds needed for closing
- No repayment required
- Can be paired with Mortgage Credit Certificate (MCC)
- First-time buyer required
- Grant is a true gift
- Can be paired with other non-Virginia Housing assistance

Mortgage Credit Certificate

- Could lower federal income taxes owed
- No cost to homebuyer to receive
- Reduces cost of homeownership
- First-time buyer required
- When used with a Virginia Housing first Mortgage product and approved Virginia Housing Lender
- Tax credit can be taken for life of loan*

Town's Options for Addressing Housing and Community Development Needs:

1. Promote home ownership and inform citizens about housing loan choices, including those offered by Virginia Housing (VHDA) and USDA Rural Development-Virginia.
2. Educate the public about funding opportunities for repairs to single-family dwellings, including the Emergency Home and Accessibility Repair Program (EHARP) and Weatherization Assistance Program (WAP). The funding source is the Virginia Department of Housing and Community Development (DHCD) and the program is administered by Lynchburg Community Action Group.
3. Remind historic property owners about the Historic Tax Credit Program.
4. Amend the Zoning Ordinance or Official Zoning Map to clearly define the Downtown Revitalization Overlay District (DRO), as many are not aware that there is an overlay district.
5. Review commercially zoned residential properties to determine if the zoning is appropriate and compatible with the future land use map.
6. Explore the Low-Income Housing Tax Credit Program with an experienced LIHTC developer as an opportunity to provide new multi-family dwelling options.
7. Review large acreage parcels to consider if changes should be made to attract developers and if the Town should explore paying for a Traffic Impact Analysis for those parcels that might require a traffic study.
8. Tackle blight by adopting a property maintenance code and hiring a code official. Continue to explore funding opportunities to address blight.
9. Strengthen incentive package that the town offers to developers, which could include tap fees, shared infrastructure costs, density bonuses, etc.



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

Items for Discussion

MEETING DATE:

August 25, 2020

ITEM #: 6e**ITEM TITLE:**

- 1) Annual Delinquent Tax List
- 2) FY2020 Budget Amendments/Departmental Transfers

DESCRIPTION:**1. Annual submission of Uncollectible and Delinquent Tax List**

Annually staff, in accordance with Section 70-3 of the Town Code, prepares a list of the uncollectible and delinquent taxes from the previous Fiscal Year (FY2020). Attached is a memorandum from Tobie Shelton, Treasurer/Finance Director, as well as the list of uncollectible and delinquent taxes. **(LINK)** Staff requests that Town Council reach a “Consensus” to place this item on the September 8, 2020 Town Council Regular Meeting Consent Agenda for approval to advertise the delinquent list and to write off the uncollectible list (less than \$20.00 and Deceased Individuals).

2. FY2020 Budget Amendments/Departmental Transfers

At the end of the fiscal year, staff compiles Budget Amendments that need to be addressed in preparation for the annual audit. Attached is a memorandum from Tobie Shelton, Treasurer/Finance Director, as well as the FY2020 Budget Amendments and Departmental Transfers. **(LINK)** Staff requests that Town Council reach a “Consensus” to place this item on the September 8, 2020 Town Council Regular Meeting Consent Agenda for approval.

BUDGET/FUNDING:

The impact to the budget will be as indicated in the budget amendments/departmental transfers.

POTENTIAL ACTION/PROPOSED MOTION:

1. Consensus to place approval to publish the Delinquent Tax List and to “write off” the Uncollectible Tax List as presented, on the September 8th Regular Meeting’s Consent Agenda.
2. Consensus to place approval of the FY2020 Budget Amendments and Departmental Transfers as presented, on the September 10th Regular Meeting’s Consent Agenda.

ATTACHMENTS:

- *Staff memo and Uncollectible and Delinquent Tax list (1)* **(LINK)**
- *Staff memo and Budget Amendments & Departmental Transfers (2)* **(LINK)**



TO: Mayor Mattox and Members of Council

FROM: Tobie Shelton

DATE: August 20, 2020

RE: Submission to Town Council of Delinquent Taxpayers Section 70-3 of the Town Code

Attached for your review is a listing of delinquent taxpayers I am required to submit annually to the Town Council as defined by Section 70-3 of the Code of the Town of Altavista. Section 70-3 is as follows:

- a. The treasurer, after ascertaining which of the taxes and levies assessed at any time in the town have not been collected, shall, within 60 days of the end of the fiscal year, make out lists as follows:
 1. A list of real estate on the land book of the county commissioner of the revenue improperly placed thereon or not ascertainable, with the amount of taxes charged thereon.
 2. A list of other real estate which is delinquent for the nonpayment of the taxes thereon. This list shall not include any taxes listed under subsection (a) (4) or (5) of this section.
 3. A list of such of the taxes assessed on tangible personal property, machinery and tools and merchants' capital, and other subjects of local taxation, other than real estate, as he was unable to collect which are delinquent. This list shall not include any taxes listed under subsection (a) (4) or (5) of this section.
 4. A list of the uncollected taxes amounting to less than \$20.00 each for which no bills were sent under Code of Virginia, § 58.1-3912.
 5. A list of uncollected balances of previously billed taxes amounting to less than \$20.00 each as to which the treasurer has determined that the costs of

collecting such balances would exceed the amount recoverable, provided that the treasurer shall not include on such list any balance with respect to which he or she has reason to believe that the taxpayer has purposely paid less than the amount due and owing.

Final notices have been mailed to all individuals advising action to be taken if taxes were not paid within our deadlines. My letter advised their names and amounts due would be published in the Altavista Journal and possible legal action taken by the Town. Such legal action includes authorizing the Department of Motor Vehicles to withhold registration of all vehicles owned and/or co-owned by the taxpayer until their debt has been cleared otherwise submitting a claim to the Department of Taxation's Integrated Revenue Management System (IRMS) to withhold the delinquent tax from revenue taxpayers may receive from the Department of Accounts through tax returns or lottery winnings.

Section 70-4(c) and (d) require Council's approval to advertise the listing of delinquent taxpayers in the local newspaper. This is an effective tool helping reduce the outstanding delinquent taxes and again this year I am requesting permission to advertise in late October or early November. This schedule would allow us to publicly announce our intentions to advertise and provide a time frame for delinquent taxpayers to resolve past due taxes before advertising in the local newspaper.

I respectfully request your approval to advertise in the Altavista Journal as noted above. Additionally, request the approval to write-off the amounts under \$20.00, past due taxes for deceased individuals, uncollectable real estate taxes and the 2015 personal property taxes due to statute of limitations making it difficult for us to collect.

Thank you.

**TOWN OF ALTAVISTA
DELINQUENT PERSONAL PROPERTY TAXES
DECEASED INDIVIDUALS**

August 21, 2020

(Recommended write-off)

<u>TAXPAYER NAME</u>	<u>TAX ROLL NUMBER</u>	<u>TAX AMOUNT</u>
Boley, Dennis Franklin	74095	\$ 17.60
Callands, Tardie Bill	11138	\$ 17.60
Callands, Tardie Bill	11140	\$ 17.60
Chism, Shirley	57865	\$ 46.74
Davis, Edna Mae	68141	\$ 38.68
Estate of Joseph Fauver	74735	\$ 22.29
Hunt, Wesley	65307	\$ 65.18
Hunt, Wesley	66337	\$ 82.78
Johnson, Janice	12628	\$ 17.60
Laronda, John	70967	\$ 50.24
Martin, Madison Rose	74603	\$ 30.72
Maulbeck, Cherie	61019	\$ 41.44
Maulbeck, Cherie	73575	\$ 168.96
Payne, Herman William	17102	\$ 17.60
Pritchett, James Edward	53327	\$ 108.22
Rorer, Samuel Estate	73825	\$ 9.14

**TOWN OF ALTAVISTA
DELINQUENT PERSONAL PROPERTY TAXES
UNDER \$20.00**

August 21, 2020

(Recommended write-off)

<u>TAXPAYER NAME</u>	<u>TAX ROLL NUMBER</u>	<u>TAX AMOUNT</u>
Accent Health	75081	\$ 7.65
Austin, Brendon	71469	\$ 5.87
Berger, Tina Cook	74173	\$ 0.64
Bowling, Ruthanne	73237	\$ 0.15
Broadhurst, Elizabeth	68923	\$ 0.05
Burnette, Zachary	74973	\$ 0.46
Burton, Callie	70845	\$ 1.31
Burton, Callie	74233	\$ 7.00
Byrd, Lisa	76501	\$ 7.23
Campbell, Crystal	71517	\$ 5.50
Carwile, Yvonne	66251	\$ 2.84
Colinger, Robert	75017	\$ 2.35
Conopco Inc	51745	\$ 2.33
Cox, Daniel Neal	69217	\$ 0.47
Dell Equipment	73487	\$ 0.37
Dishnet Wireline	71547	\$ 0.10
Doss, Dennis Lee Jr	74923	\$ 2.99
Everhart, Doris	62637	\$ 0.02
Fitzgerald, Judy Corey	74171	\$ 1.60
Hastings, Jessica Paige	72619	\$ 0.35
Hicks, Abigail	71457	\$ 0.02
Horne, Christian	71479	\$ 2.38
Joybiz Inc	72731	\$ 0.93
Loving, Barbara	73707	\$ 0.06
Miller, Jonathan Michael	74695	\$ 5.68
Murray, Brian	61559	\$ 1.03
Pannell, Zakiyah Stone	71265	\$ 1.01
Shields, Dwayne E	10534	\$ 9.07
Smith, Bryan Douglas	71031	\$ 1.16
Smither, Michael	64379	\$ 1.16
Sowers, Julie	74111	\$ 0.47
Williams, Audrey	74437	\$ 2.07
Williams, Audrey	73631	\$ 0.34
Williams, Brian Keith	74501	\$ 0.21
Wilson, David Lee	72325	\$ 5.87
Wilson, David Lee	74085	\$ 1.12
Witt, Jeffrey Dean	74043	\$ 3.15
Wood, Janet	73105	\$ 1.75
Zed Enterprises LLC	69977	\$ 5.82

TOWN OF ALTAVISTA
DELINQUENT REAL ESTATE TAXES
August 21, 2020

<u>TAXPAYER NAME</u>	<u>TAX ROLL NUMBER</u>	<u>TAX AMOUNT</u>
Anthony, Latoya	45291	\$ 287.32
Anthony, Latoya	47803	\$ 5.90
Bentley, Willard/Glenda	47849	\$ 41.30
Bentley, Willard/Glenda	75229	\$ 0.94
Bond, Bernard/Louise	44767	\$ 60.45
Turner, Alice/Bond, Bernard	47983	\$ 10.13
Clark, Lillian	45043	\$ 136.34
Coffey, William/Virginia	45103	\$ 140.23
Coleman, Dorella	45119	\$ 51.53
Crider, Deborah	45259	\$ 82.32
Dalton, Mark	45329	\$ 88.14
Dalton, Mark	45331	\$ 4.69
Dawson, John/Nancy	45367	\$ 48.91
Dawson, John/Nancy	75409	\$ 1.88
Doss, Crystal	45491	\$ 92.27
First Properties	44679	\$ 49.28
GD Altavista LLC	66707	\$ 26.99
GD Altavista LLC	69859	\$ 20.07
GD Lane Park LLC	47503	\$ 19.98
Gill, Deedee Kay	45727	\$ 263.31
Gregory, Marcellus Preston	47535	\$ 9.58
Gregory, Marcellus Preston	45927	\$ 59.33
Gregory, Marcellus Preston	75613	\$ 0.28
Hall, David W	45961	\$ 23.66
Hall, David W	45963	\$ 35.39
Hamer, Jeston	46553	\$ 60.17
Hamer, Jeston	46555	\$ 18.77
Hamer, Jeston	46557	\$ 83.26
Hamer, Jeston	75639	\$ 18.77
Horne, Catherine	47091	\$ 194.68
Kershner, Darl & Shirley	46363	\$ 587.23
Lambert, Jason/Kathy	46823	\$ 57.45
Laronda Limited Partnership	174	\$ 18.77
Laronda Limited Partnership	46683	\$ 60.07
Laronda Limited Partnership	46685	\$ 40.17
Laronda Limited Partnership	75863	\$ 18.77
Laronda Limited Partnership	75865	\$ 18.77
Laronda Limited Partnership	75867	\$ 211.20
Laronda Limited Partnership	75869	\$ 18.77
Laronda Limited Partnership	75871	\$ 18.77
Laronda Limited Partnership	75873	\$ 18.77
Laronda Limited Partnership	75877	\$ 1.88
Laronda Limited Partnership	75879	\$ 1.88

Little, Sheila Exec	45755	\$	438.09
Little, Sheila Exec	45757	\$	53.52
Martinsville Holdings	47519	\$	32.48
Miller, Dennis/Shirley	46841	\$	77.10
Minnis, Earl & Odessa	46745	\$	317.03
Monroe, Jeffrey	76017	\$	1.41
Monroe, Jeffrey	76019	\$	12.01
Monroe, Jeffrey	76021	\$	101.75
Moorman, Charlie	46853	\$	72.84
Simerly, Ronald	47615	\$	66.84
Simerly, Ronald	47617	\$	4.13
Sycamore Creek Holdings	46241	\$	32.19
Thomasville Retail	46411	\$	223.96
Trent, Curtis/Brenda	47941	\$	84.20
Walls, Delia	44553	\$	49.18
Walls, Delia	76419	\$	1.41
Walls, Delia	76421	\$	1.41

**TOWN OF ALTAVISTA
DELINQUENT REAL ESTATE TAXES**

August 21, 2020

UNDER \$20.00

(Recommended write-off)

<u>TAXPAYER NAME</u>	<u>TAX ROLL NUMBER</u>	<u>TAX AMOUNT</u>
Andrews, Ronnie/Delene	45537	\$ 16.90
Andrews, Ronnie/Delene	45539	\$ 10.13
Babcock, John/Heather	75193	\$ 1.41
Bennett, Lawrence	44691	\$ 0.36
Blanks, Daniel	75231	\$ 2.82
Brees, Robyn	75247	\$ 9.01
Bryant, Clayton	44833	\$ 0.85
Burton, Margaret	44905	\$ 0.04
Clay, Landon	45055	\$ 11.26
Clay Ollie Etals	45067	\$ 11.26
Collado, James V	75333	\$ 0.80
Crabtree, James William	45231	\$ 5.14
Dikeman, Cale	75425	\$ 2.82
Hall, Elsie	75617	\$ 1.88
Hall, Elsie	75619	\$ 1.88
Hall, Phyllis	45349	\$ 1.13
Hall, Phyllis	75621	\$ 1.13
Hall, Phyllis	75623	\$ 1.13
Hall, Phyllis	75625	\$ 1.13
Hall, Phyllis	75627	\$ 1.13
Harvey-Khabir, Ku'Uipo	44827	\$ 12.95
Kelly, David	75815	\$ 1.41
King, Thelbert	46381	\$ 1.41
King, Thelbert	75847	\$ 3.64
Laney, James C Jr	46443	\$ 0.01
Mattox, Shelby	46631	\$ 0.02
Rodriquez, Linda	76227	\$ 0.94
Tweedy, William H	48299	\$ 11.26
Wells Fargo Bank	69883	\$ 2.82

TOWN OF ALTAVISTA
DELINQUENT PERSONAL PROPERTY TAXES
August 21, 2020

<u>TAXPAYER NAME</u>	<u>TAX ROLL NUMBER</u>		<u>TAX AMOUNT</u>
A & A Sydicate Corp	69965	\$	104.50
Adams, Jessica Shanese	70911	\$	44.96
Adams, Jessica Shanese	70913	\$	95.47
Adams, Jessica Shanese	72637	\$	49.31
Adams, Jessica Shanese	74289	\$	57.09
Adams, Kodie Nathaniel	73065	\$	19.25
Adams, Raquel	74081	\$	17.60
Adams, Richard Wilson	69453	\$	36.85
Adams, Richard Wilson	71035	\$	67.70
Altavista Alarm/Tweedy	14450	\$	234.67
Alexander, Robert	70953	\$	38.68
Anderson, John Jeffrey	69283	\$	34.13
Andrews, Duncan Ewart	18010	\$	82.78
Andrews, Duncan Ewart	55237	\$	82.78
Andrews, Duncan Ewart	61569	\$	120.74
Annas, Jeremy David	70697	\$	57.09
Annas, Jeremy David	70699	\$	17.60
Anthony, Thomas Julian	15896	\$	23.79
Anthony, Thomas Julian	15898	\$	23.79
Armistead, Franchesca Nicole	67677	\$	224.92
Armistead, Franchesca Nicole	70861	\$	77.07
Arthur, William	67659	\$	117.24
Ashby, Arlena	74197	\$	46.36
Aubrey, Mark John	70937	\$	36.63
Ballard, Tammy	70597	\$	66.42
Barnard, Robert Glenn Jr	69415	\$	45.93
Berger, Tavio	74493	\$	79.79
Berger, Willie Carl Jr	68809	\$	108.08
Berger, Willie Carl Jr	72193	\$	36.85
Berkley, Lorcrushal	75007	\$	32.36
Birdsall, Cassandra	74329	\$	96.55
Blanchard, Donna	68845	\$	17.60
Blanchard, Donna	70591	\$	35.15
Bogert, Katherine	61073	\$	36.85
Bogert, Katherine	62579	\$	36.85
Bogert, Kyler	67571	\$	32.74
Bogert, Kyler	69063	\$	17.60
Bolen, Brenda Jo	66551	\$	45.22
Bonds, Monique Nicole	72035	\$	86.37
Bowling, Michelle	71187	\$	86.54
Boyd, James Allen	74159	\$	32.86
Branham, Morgan	72881	\$	19.25
Breaux, Kayleigh	73219	\$	71.34
Brew, Shanna Myers	72883	\$	43.91
Brew, Shanna Myers	73443	\$	12.29

Brown, Jasmine	74253	\$	58.46
Brown, Shana Matirs	58659	\$	82.78
Brown, Shana Matirs	58661	\$	82.78
Brown, Shana Matirs	58663	\$	84.02
Brown, Timron Debae	69505	\$	23.79
Bruce, Jonathon	68937	\$	146.86
Brumfield, Candace Nicole	64959	\$	146.66
Brumfield, Candace Nicole	72533	\$	61.45
Brumfield, Candace Nicole	74213	\$	31.47
Brumfield, Candace Nicole	74215	\$	17.60
Bryant, Elizabeth	57835	\$	33.37
Burroughs, Ashley	69747	\$	53.26
Burroughs, Ashley	71121	\$	76.59
Butler, Frances	68421	\$	26.59
Callands, Kenneth Lewis	69055	\$	80.92
Calloway, Gwendolyn	70753	\$	41.39
Calyer, Rachael	74635	\$	30.46
Campbell, Scott A	73221	\$	158.26
Canada, Kris	70873	\$	32.23
Canada, Kris	74265	\$	27.07
Canada, Kris	74267	\$	42.21
Canada, Kris	74269	\$	30.34
Cantarero, Carol Frances	71485	\$	91.80
Carr, William Robert	67639	\$	82.78
Chambers, James Junior	70973	\$	32.59
Chapman, Andrea G	61087	\$	46.74
Chavis, Lisa Ann	69763	\$	35.63
Childress, Kelcey	74637	\$	51.29
Chism, Shirley	57865	\$	46.74
Clark, Randall	73153	\$	33.99
Clark, Treavon	73223	\$	17.60
Clay, Landy Mychelle	74025	\$	35.26
Clay, Phillip	73899	\$	46.24
Clements, Zakendra	72975	\$	36.27
Coffer, Angela Brandi	74163	\$	47.50
Coffer, Virginia Susan	73009	\$	19.25
Coffey, Callie	68139	\$	42.21
Coffey, Kimberley	68053	\$	37.28
Cole, Linda	74161	\$	17.60
Coleman, Dorella	68797	\$	34.63
Coles, Eric Vincent	61703	\$	42.45
Coles, Eric Vincent	72327	\$	106.64
Coles, Erika Marie	73303	\$	111.11
Collins, Larry Boyd Jr	65033	\$	95.66
Conner, Jodi	72391	\$	49.27
Conner, Jodi	72397	\$	39.04
Cook, Gary	72479	\$	35.21
Cox, James Allen	69377	\$	23.79
Cox, James Allen	69379	\$	46.63
Cox, James Allen	69381	\$	23.79
Cox, Theresa	74797	\$	27.94
Creasy, Ronnie Thomas	71403	\$	22.14

Crews, Phillip	73649	\$	17.60
Crider, Joann Denise	69267	\$	40.29
Crider, Joann Denise	69269	\$	23.79
Crider, Osbey	74527	\$	57.34
Crider, Shamica Nicole	60393	\$	48.59
Crider, Shamica Nicole	69043	\$	111.69
Crider, Shamica Nicole	72459	\$	36.80
Dalton, Dennis Lee	68743	\$	103.85
Dalton, Jennifer	72171	\$	44.84
Dalton, Jillian Devereaux	71205	\$	40.11
Davis, Carolyn	66785	\$	49.14
Davis, Ernestine Marie	67747	\$	30.35
Davis, Jeremy Maurice	63691	\$	82.78
Davis, Jeremy Maurice	63693	\$	119.19
Davis, Michael Oshia	72545	\$	19.25
Davis, Michael Oshia	72547	\$	68.74
Day, Candice Michelle	71389	\$	41.15
Day, Scott Earl	72613	\$	36.02
Day, Scott Earl	72615	\$	119.99
Day, Scott Earl	72617	\$	36.77
Day, Wynter	73879	\$	36.39
Deshazor, Tammy	73311	\$	87.86
Devercelly, Ashley Kay	65029	\$	23.79
Devercelly, Ashley Kay	66235	\$	37.47
Devercelly, Ashley Kay	69147	\$	45.92
Dews, Mary Dianna	69625	\$	37.47
Dino's Sportsbar Grill	66775	\$	144.84
Doss, Crystal	68107	\$	107.67
Doss, Crystal	74373	\$	129.96
Doss, Crystal	74375	\$	33.63
Doss, Jarrett Kendall	72103	\$	219.99
Doss, Jarrett Kendall	73917	\$	176.31
Drew, Rebecca	69423	\$	34.75
Dudley, Cody Matthew	73227	\$	8.93
Dudley, Cody Matthew	73229	\$	73.42
EFM Inc	61363	\$	22.29
EFM Inc	15882	\$	542.08
Elliott, Richard Troy Jr	64507	\$	22.04
Elliott, Richard Troy Jr	64509	\$	12.29
Elliott, Richard Troy Jr	64511	\$	36.85
Elliott, Richard Troy Jr	68725	\$	36.85
Emerson, Woodrow Jr	67489	\$	82.78
Emerson, Woodrow Jr	70713	\$	41.39
Enoch, Wesley	74065	\$	46.86
Erk, Patrick Hughes	62265	\$	79.32
Evans, Autumn	69123	\$	51.65
Evans, Autumn	72543	\$	62.75
Farrar, Monica	74655	\$	41.95
Farrar, Monica	74657	\$	17.60
Faulkner, Michael	73155	\$	78.03
Ferlise, Nicholas Wayne	67857	\$	43.37
Ferlise, Nicholas Wayne	70951	\$	33.84

Fitzgerald, Sara Salgado	69669	\$	45.93
Fitzgerald, Sara Salgado	69671	\$	45.93
Fitzgerald, Sara Salgado	71073	\$	45.97
Fox, Shawn	68101	\$	33.37
Fox, Thomas	74977	\$	47.25
Freeman, Frank William	69487	\$	56.21
Freeman, Hannah Grace	69725	\$	153.76
Gatewood, Joshua Ryan	71069	\$	47.64
Gatewood, Joshua Ryan	71069	\$	43.97
Geico Corp	73909	\$	231.15
Giboyeaux, Jannette	72757	\$	34.68
Giboyeaux, Jannette	72759	\$	30.59
Gilbert, Dorethea	68473	\$	17.60
Gilbert, Dorethea	70173	\$	38.79
Gilbert, Dorethea	71833	\$	35.77
Gilbert, Dorethea	71835	\$	51.79
Gilbert, Sherwood	70325	\$	74.03
Gilbert, Sherwood	71973	\$	35.07
Gilbert, Sherwood	73799	\$	44.22
Gilbert, Sherwood	73801	\$	35.39
Gilbert, Vivian	74801	\$	72.84
Goode, Tonette	74677	\$	89.25
Graves, Clarence	72743	\$	36.27
Graves, Clarence	73285	\$	65.92
Graves, Kiara	74227	\$	35.77
Greene, Christopher	69699	\$	65.18
Gregory, Ruth	74669	\$	64.91
Grishaw, Amber	74775	\$	64.91
Hacker, Catherine Elaine	73091	\$	18.50
Hacker, Catherine Elaine	73093	\$	47.34
Haerman, Heather	74805	\$	49.51
Haley, Erica Marie	74747	\$	34.13
Hall, Ashley	70957	\$	134.93
Hall, Lora Mae	69627	\$	32.98
Hall, Lora Mae	71079	\$	23.27
Hall, Lora Mae	72831	\$	32.36
Hall, Lora Mae	74447	\$	66.67
Hall, Megan	74679	\$	164.27
Hall, Shenise	74749	\$	55.69
Hall, Yvonne B	61143	\$	33.29
Hall, Yvonne B	62663	\$	4.80
Hall, Yvonne B	70183	\$	69.81
Hamilton, Jean	71057	\$	17.60
Hansen, Michael	64979	\$	28.95
Hansen, Michael	69127	\$	29.21
Hansen, Michael	72553	\$	96.81
Harmon, Mark Clinton	72017	\$	36.85
Harmon, Mark Clinton	72019	\$	30.46
Harmon, Mark Clinton	73841	\$	38.53
Harmon, Vickie	68343	\$	40.19
Harmon, Vickie	71673	\$	31.86
Harris, Robert L Jr	72939	\$	36.92

Harris, Robert L Jr Estate	67251	\$	33.50
Harris, Robert L Jr Estate	68775	\$	34.26
Harrison, Matthew	73157	\$	29.21
Harrison, Matthew	74671	\$	33.12
Hartless, Jamie	66423	\$	29.83
Hayden, Annita Lavon	73017	\$	36.85
Haynes, Brian Eugene	66689	\$	82.78
Haynes, Brian Eugene	66691	\$	169.63
Head, Lee Ann	63657	\$	17.95
Head, Lee Ann	74249	\$	37.53
Hockaday, Christy	72477	\$	149.12
Hodges, Stacey	72725	\$	65.92
Hodges, Stacey	72727	\$	259.89
Hodges, Stacey	74355	\$	187.69
Hogan, Bobby Wade	74325	\$	68.30
Hogan, Edwin L	56295	\$	84.28
Hogan, Edwin L	71849	\$	342.39
Hogan, Jessica	69045	\$	42.57
Hogan, Jessica	69047	\$	17.60
Hogan, Jessica	72463	\$	58.35
Holland, John Thomas	70831	\$	38.02
Holland's Asphalt Sealing	60383	\$	23.79
Hood, Silvy Lee	68291	\$	96.25
Hostetter, Caitlyn Lynn	71233	\$	40.11
Howell, Kaitlin Elaine	72981	\$	36.85
Hubbard, Robert Jr	57343	\$	9.98
Hubbard, Robert Jr	66097	\$	47.62
Hubbard, Robert Jr	66099	\$	17.60
Hudson, Neah Denise	67901	\$	72.46
Hundley, Albert	74941	\$	30.35
Hunt, Bernadette Taylor	73325	\$	41.44
Hunt, Daryl Kendell	72929	\$	26.96
Hunt, Daryl Kendell	74521	\$	41.70
Hunt, Dena Ruth	69393	\$	68.73
Hunt, Nathaniel	74609	\$	34.50
Hunt, Raleigh Lee	65889	\$	28.07
Hunt, Wesley Leon	65307	\$	65.18
Hunt, Wesley Leon	66337	\$	82.78
Hunt, Wesley Leon	72659	\$	43.25
Hunter, Kathryn	74003	\$	17.60
Hyman, Jerome Terrill	66339	\$	158.98
Hyman, Jerome Terrill	66341	\$	105.94
Jackson, Dacorian Shavon	73019	\$	90.47
Jefferson, Jamie Shakeira	71439	\$	97.84
Jefferson, Jamie Shakeira	71441	\$	22.14
Johns, Samantha	72321	\$	31.61
Johnson, Elaine Ann	71341	\$	50.56
Johnson, Kearstyn Raye	73129	\$	37.45
Johnson, Renesha Janice	72703	\$	42.86
Johnson-Myers, Lavinia Fay	70941	\$	73.56
Johnson-Myers, Lavinia Fay	72699	\$	30.72
Jones, Diana	70567	\$	41.95

Jones, Nicholas Paul	71189	\$	140.82
Jones, Nicholas Paul	71191	\$	64.75
Jones, Nicholas Paul	73075	\$	36.85
Jones, Nicholas Paul	74555	\$	17.60
Jones, William McCoy	68001	\$	36.85
Jordan, Junior	51257	\$	82.78
Jordan, Junior	58505	\$	45.93
Joshi, Smriti	74889	\$	45.48
Joshi, Smriti	74891	\$	30.35
Kershner, Kevin Ray	66191	\$	23.79
Khalil, Mustafa Fayeze	74737	\$	77.52
Klein, Zora B	64125	\$	41.12
Klemm, Adam Robert	65125	\$	82.78
Knowles, Elizabeth Stacey	70993	\$	39.28
Knowles, Timothy Lee	74901	\$	102.87
Lacy, Michael Benjamin	72849	\$	28.09
Lambert, Jason K	68355	\$	19.69
Lambert, Jason K	73565	\$	41.70
Lambert, Kathy	62075	\$	9.98
Lashaway, Amber	74033	\$	34.38
Layne, Idamae	74103	\$	31.98
Lear, Marianne	69231	\$	37.47
Lear, Marianne	69233	\$	47.19
Lee, Kelsie Denise	71285	\$	77.89
Lee, Rodney	73567	\$	31.22
Lee, Terry Colbert	69005	\$	53.53
Lee, Todd Wayne	62301	\$	72.28
Lindsay, Melissa	74113	\$	34.63
Little, James William	71535	\$	58.99
Little, James William	71537	\$	76.94
Logan, James Calvin	73051	\$	68.78
Logwood, Jessica	68209	\$	92.72
Lomotey, Michael	66499	\$	192.61
Lomotey, Michael	66501	\$	82.78
Lovelace, Victoria	74117	\$	63.90
Lovelace, Victoria	74119	\$	30.97
Lovelace, Victoria	75057	\$	5.87
Lucas, Julie Ann	73183	\$	49.39
Manpower Intl	12884	\$	29.61
Martin, Charles Bea	56319	\$	17.60
Martin, Charles Bea	66995	\$	17.60
Martin, Charles Bea	68509	\$	45.98
Martin, Charles Bea	70219	\$	50.02
Martin, Jelica	74615	\$	30.85
Martin, Jelica	74617	\$	39.80
Martin, Madison	74603	\$	30.72
Martin, Tina Renee	67761	\$	140.47
Martin, Tina Renee	74319	\$	46.74
Martinez, Calzada	69037	\$	74.42
Massie, Sharon	74327	\$	31.47
Mayhew, Brenda	74757	\$	17.60
McKenzie, Kirsten	73265	\$	17.60

McRae, Tameka	69097	\$	41.06
Melvin, Shannon Charisse	65983	\$	74.94
Melvin, Shannon Charisse	67353	\$	101.45
Miller, Charles Joseph	61705	\$	36.85
Miller, Courtney Leigh	69799	\$	36.85
Miller, Seth Gavin	72389	\$	157.77
Minnis, Tristan Obryan	70579	\$	130.67
Miracle Outreach Deliverance	56841	\$	98.96
Mitchell, Jennifer Lynn	72205	\$	36.85
Monaghan, Elizabeth Anne	72945	\$	19.25
Monroe, Nactavia Lashay	71215	\$	31.79
Moon, Ricco	72671	\$	17.60
Moorman, Darnell A	68851	\$	38.68
Moorman, Darrell Lee	64969	\$	82.78
Moss, Lateisha	74073	\$	29.95
Moss, Lateisha	74075	\$	91.65
Myers, Marian	72685	\$	23.37
Myers, Stevie Clinton	72147	\$	40.21
Myers, Stevie Clinton	72149	\$	59.59
Myers, Tori	72363	\$	44.73
Myers, Tori	66085	\$	38.17
Neal, Kerrie	74661	\$	17.60
Nelson, Shawntae P	70795	\$	108.46
Nowlin-Vincent, Nicole	67797	\$	61.84
Odom, Myles	74999	\$	30.85
Ozan, Jacob Robert	71217	\$	19.25
Paggans, Robert William	63009	\$	48.97
Palmer, Shannon	69605	\$	17.60
Pannell, Dakota	71287	\$	36.91
Pannell, Dakota	72885	\$	17.60
Pannell, Shemeka	67237	\$	32.98
Pannell, Sherman	15520	\$	17.60
Pannell, Sherman	61339	\$	17.60
Pannell, Sherman	71995	\$	53.66
Pannell, Sherman	73817	\$	58.66
Pannell, Sherman	73819	\$	30.72
Parker, Alan Jr	74957	\$	42.71
Patrick, Broderick	66015	\$	37.28
Patrick, Broderick	67393	\$	49.77
Patrick, Broderick	72271	\$	127.89
Payne, Cindy Lee	62739	\$	39.18
Payne, John C	56083	\$	82.78
Payne, John C	62537	\$	82.78
Payne, Jonathan Homer	72377	\$	17.60
Payne, Jonathan Homer	72379	\$	19.25
Payne, Kenneth	67041	\$	17.60
Payne, Linda J	71707	\$	17.60
Payne, Linda J	71709	\$	36.85
Payne, Linda J	71711	\$	17.60
Payne, Linda J	71713	\$	5.50
Payne, Linda J	73583	\$	28.70
Payne, Timith Auto Repair	75095	\$	146.67

Pena, Carla	73133	\$	46.24
Pennington, Jeffrey	74145	\$	35.89
Perkins, Harold Jerry	62741	\$	19.25
Perkins Twin Tire LLC	55755	\$	11.34
Perkins Twin Tire LLC	55757	\$	20.07
Perkins Twin Tire LLC	57027	\$	9.98
Perkins Twin Tire LLC	57029	\$	9.98
Perkins Twin Tire LLC	58629	\$	9.98
Perkins Twin Tire LLC	61725	\$	13.50
Perkins Twin Tire LLC	66051	\$	10.56
Perkins Twin Tire LLC	66053	\$	100.32
Perkins Twin Tire LLC	67455	\$	29.97
Perkins Twin Tire LLC	73233	\$	665.59
Peters, Angela Marie	72761	\$	63.32
Petty, Virginia Harris	71415	\$	106.14
Petty, Virginia Harris	72707	\$	19.25
Pfeffer, Samantha	67763	\$	28.84
Plumley, Ashley	70841	\$	17.60
Plumley, Ashley	74231	\$	48.26
Poindexter, Antonio Keith	71347	\$	35.52
Poindexter, Antonio Keith	71349	\$	44.15
Pollard, Elaine	67055	\$	47.00
Pollard, Elaine	68563	\$	17.60
Pollard, Elaine	73735	\$	29.83
Pollard, William E	65655	\$	31.51
Pollard, William E	67059	\$	35.34
Pool, Samantha	71269	\$	22.14
Powell, Benjamin Carroll	69607	\$	77.48
Powell, Benjamin Carroll	69611	\$	50.56
Powell, Benjamin Carroll	72823	\$	19.25
Powell, Benjamin Carroll	74441	\$	17.60
Powell, Benjamin Jonathan	68181	\$	71.34
Powell, Benjamin Jonathan	72779	\$	46.46
Powell, Benjamin Jonathan	72781	\$	138.39
Powell, Bianca	71159	\$	45.86
Pratt, Anne	72301	\$	35.51
Pritchett, James Edward	53327	\$	82.78
Quishpe, Sanchez Javier	69571	\$	179.66
Ramirez, Chavez	74849	\$	51.65
Reid, Pamela	70885	\$	43.46
Reynolds, Albert Mclinden	72071	\$	19.25
Reynolds, Albert Mclinden	73881	\$	5.55
Reynolds, Jack	73149	\$	90.13
Rhodes, Latoya	71009	\$	73.60
Rice, Krystal Lee	70705	\$	38.16
Rice, Krystal Lee	74123	\$	100.08
Rice, Krystal Lee	74125	\$	39.30
Rice, Matthew William	69561	\$	44.37
Rivera-Murtaza, Ivette	73273	\$	73.25
Robertson, Davon Lamarr	69435	\$	51.27
Robertson, Edna Logwood	68881	\$	75.06
Robinson, Carl Antonio	72323	\$	19.25

Robinson, Davon	72709	\$	41.56
Robinson, Davon	74339	\$	30.83
Robinson, Dionta Lemar	69409	\$	45.93
Robinson, Dionta Lemar	71371	\$	79.59
Robinson, Jerome Delonta	71161	\$	36.85
Robinson, Sharon Teresa	68847	\$	58.99
Robinson, Sharon Teresa	70601	\$	108.66
Rountrey, Joshua Aaron	72249	\$	43.64
Rousey, Sharon	74851	\$	36.27
Russell, Angela	70545	\$	30.60
Russell, Stanley	71723	\$	188.91
Russell, Stanley	72111	\$	10.87
Saye, Shelly Andrea	71289	\$	111.45
Schwochow, Robin Kaye	71373	\$	58.99
Shelton, Eve Marie	74833	\$	32.23
Shields, Jeremy Lynn	56781	\$	45.93
Shields, Jeremy Lynn	56783	\$	45.93
Slayton, Raven Sheree	62215	\$	197.93
Smith, Rejoice Angeliek	73323	\$	35.59
Smith, Shaneisha Tiara	69189	\$	90.09
Snead, Jennifer Grove	69437	\$	39.44
Snively, Philip	67701	\$	42.54
Southernland, Samantha Lee	71087	\$	120.80
Southernland, Samantha Lee	72839	\$	19.25
SOVA Firearms	69953	\$	64.17
Spidle, Michael	74443	\$	149.91
Spradlin, Pauline R	66369	\$	39.57
Spradlin, Pauline R	70923	\$	81.64
Stafford, John James	67395	\$	30.35
Stahl, Cameron	73201	\$	17.60
Stahl, Cameron	74579	\$	17.60
Stahl, Cameron	74581	\$	35.15
Stahl, Cameron	74583	\$	32.98
Stepp, Bradford	74331	\$	31.72
Stone, Kenneth	71375	\$	69.57
Stone, Kenneth	73141	\$	10.21
Stone, Kenneth	73471	\$	24.64
Stone, Malik	74933	\$	92.40
Strope, Richard Earl	68083	\$	19.25
Stump, Karley	74883	\$	32.86
Symmes, Tracy Elizabeth	67873	\$	36.06
T S Maintenance	65411	\$	88.00
Talbott, Terry	74575	\$	10.68
Talbott, Terry	74577	\$	17.60
Taylor, Diana	72467	\$	55.95
Taylor, Diana	72469	\$	31.61
Taylor, Diana	74169	\$	32.62
Taylor, Kevin	74209	\$	15.26
Thacker, Dustin	55339	\$	17.60
Thacker, Dustin	72255	\$	9.98
Thacker, Dustin	74017	\$	17.60
Thacker, Dustin	74019	\$	45.24

Thacker, Dustin	74021	\$	80.92
Thacker, Janet Scruggs	72207	\$	43.30
Thacker, Janet Scruggs	73985	\$	23.59
Thomas, Adettra A	69801	\$	450.40
Thomas, Vicky	64529	\$	41.19
Thornhill, Caniqua Simone	71223	\$	71.50
Thornhill, Caniqua Simone	71225	\$	85.17
Thornhill, Paige Amber	71447	\$	38.41
Tice, James Jr	73931	\$	38.17
Towler, Jamie Lee	68701	\$	120.56
Towler, Jamie Lee	68703	\$	91.09
Towler, Jamie Lee	68705	\$	65.18
Towler, Roger L	62811	\$	37.41
Trent, Brenda Marsh	69115	\$	32.36
Triplett, Daniel	74549	\$	32.12
Troutman, Clara J	68085	\$	36.85
Tucker, Alisha	74935	\$	17.60
Tucker, Angela Eloise Myers	67019	\$	47.31
Tucker, Angela Eloise Myers	68963	\$	78.89
Tucker, Blair	74767	\$	71.33
Tucker, Brenda Sue	73029	\$	56.94
Tucker, Courtney Ladawn	69563	\$	148.85
Tucker, Darius Lamar	73087	\$	36.85
Tucker, Marvalin	66577	\$	77.90
Tucker, Marvalin	67801	\$	42.39
Tucker, Marvalin	71451	\$	82.82
Tucker, Shannon/SPTS Salon	75099	\$	58.67
Tweedy, Elizabeth	74665	\$	36.77
Vapor Bound LLC	73515	\$	118.45
Vapor Bound LLC	75083	\$	88.00
Vazquez, Chinchilla	74781	\$	62.39
Vennable, Andrea Christina	74571	\$	180.11
Vennable, Bernard	67889	\$	55.95
Viar, Ashley	71281	\$	32.12
Waller, Alen Augustus	69641	\$	45.93
Waller, Bertha Mae	60665	\$	58.99
Waller, Bertha Mae	69079	\$	123.52
Waller, Kerry Wayne	59881	\$	28.83
Waller, Kerry Wayne	59883	\$	17.60
Waller, Kerry Wayne	65813	\$	36.27
Waller, Kerry Wayne	70411	\$	44.34
Waller, Milton Leon	69773	\$	53.07
Waller, Tracy Johnathon jr	72527	\$	43.64
Waller, Vanessa Ann	70819	\$	33.57
West, Angelica	73031	\$	35.65
West, Franklin	72835	\$	17.60
West, Helen	67619	\$	39.68
Widget Home LLC	72957	\$	232.31
Williams, Marlene	74275	\$	41.06
Williams, Nakisha	72999	\$	33.99
Williams, Nakisha	72997	\$	32.36
Witte, Gregory Allen	73001	\$	19.25

Witte, Gregory Allen	73003	\$	19.25
Wood, Cody Wayne	72775	\$	17.60
Wood, Cody Wayne	73251	\$	87.98
Woodruff, Sharon Elizabeth	68825	\$	23.79
Woodruff, Sharon Elizabeth	70575	\$	41.39
Woodruff, Tyreek Dequon	73063	\$	90.45
Worley, Gregory Bryce	69643	\$	49.87
Worley, Gregory Bryce	69645	\$	33.29
Worley, Stephanie M	68653	\$	34.15
Worley, Stephanie M	72009	\$	36.85
Worsham, Micheal	74347	\$	50.28
Worsham, Micheal	74349	\$	91.65
Wright, Ashley Rynane	69041	\$	33.63
Yeatts, Brian	74591	\$	33.75
Yuille, Vernice Scott	73619	\$	32.48

**TOWN OF ALTAVISTA
DELINQUENT PERSONAL PROPERTY TAXES**

August 21, 2020

2015 TAX YEAR

(Recommended write-off)

<u>TAXPAYER NAME</u>	<u>TAX ROLL NUMBER</u>	<u>TAX AMOUNT</u>
Andrews, Duncan	18010	\$ 25.44
Andrews, Duncan	55237	\$ 25.44
Andrews, Duncan	61569	\$ 41.91
Anthony, Thomas Julian	15896	\$ 25.44
Anthony, Thomas Julian	15898	\$ 25.44
Barnwell, Laquienta	66459	\$ 25.44
Barnwell, Laquienta	66461	\$ 37.63
Bertiz, Rafeal	67939	\$ 25.44
Bolen, Brenda Jo	66551	\$ 47.20
Brown, Shana Matirs	58659	\$ 25.44
Brown, Shana Matirs	58661	\$ 25.44
Brown, Shana Matirs	58663	\$ 25.44
Brumfield, Candace	64959	\$ 10.02
Carr, William	67639	\$ 25.44
Catron, Jamie Lynn	60181	\$ 39.92
CJL Enterprises	59093	\$ 55.18
Clerval, Dennis Martin	66647	\$ 25.44
Clerval, Dennis Martin	67877	\$ 2.79
Collins, Alice Morris	67281	\$ 45.91
Crider, JoAnn	67881	\$ 49.35
Crider, JoAnn	67883	\$ 25.44
Davis, Jacqueline	66421	\$ 50.78
Davis, Jeremy	63691	\$ 25.44
Davis, Jeremy	63693	\$ 42.04
Dino's Sportsbar	66775	\$ 80.67
Devercelly, Ashley Kay	65029	\$ 25.44
Devercelly, Ashley Kay	66235	\$ 40.33
Easley, Frank James	67721	\$ 25.44
Elliott, Richard Terrell	62183	\$ 5.21
Elawady, Ahmed Elsayed	68149	\$ 393.41
Erk, Patrick Hughes	62265	\$ 88.71
Ferlise, Nicholas Wayne	67857	\$ 45.34
Fitzgerald, Shanice	67927	\$ 41.47
Holland's Asphalt Sealing	60383	\$ 25.44
Hunter, Gary Patrick	68015	\$ 20.35
Hunter, Gary Patrick	68017	\$ 14.87
Hunter, Gary Patrick	68019	\$ 19.25
Hunter, Gary Patrick	68021	\$ 47.44
Hunter, Gary Patrick	68023	\$ 25.44
Hunter, Gary Patrick	68025	\$ 25.44
Hyman, Jerome	66339	\$ 59.10
Hyman, Jerome	66341	\$ 41.19
Johnson, Jeffrey	66639	\$ 69.35
Jones, Stephanie	58757	\$ 58.23

Jordan, Junior	51257	\$	25.44
Jordan, Junior	58505	\$	25.44
Kershner, Kevin Ray	66191	\$	25.44
Kershner, Kevin Ray	67611	\$	38.89
Klekotka, Teresa	66609	\$	25.44
Klemm, Adam Robert	65125	\$	25.44
Knowles, Kristin	67529	\$	89.87
Logwood, Jessica	68209	\$	100.62
Lomotey, Michael	66499	\$	87.29
Lomotey, Michael	66501	\$	25.44
McClain, Robert	67531	\$	110.93
Melvin, Shannon	65983	\$	87.73
Melvin, Shannon	67353	\$	60.95
Millner, Estelle Mae	68095	\$	53.79
Myers, Iuwanti	63205	\$	25.44
Paggans, Robert W	63009	\$	14.87
Payne, John C	56083	\$	25.44
Payne, John C	62537	\$	25.44
Power, Jessica Lynn	68035	\$	38.19
Pritchett, James Edward	53327	\$	25.44
Reynolds, Annie	65007	\$	103.77
Rogers, Joyce	65923	\$	43.19
Shields, Dwayne E	10534	\$	17.54
Shields, Jeremy Lynn	56781	\$	25.44
Shields, Jeremy Lynn	56783	\$	25.44
Spradlin, Pauline R	66369	\$	43.35
Sutphin, Joel W Sr	53225	\$	14.87
Symmnes, Tracy	67873	\$	39.04
Tavarez, Vargas	67993	\$	37.89
Thomas, Adretta	59417	\$	5.86
Tucker, Kenneth	66895	\$	25.44
Waller, Jasmine	67909	\$	67.35
West, Tiffany Amber	67345	\$	25.44
Younger, Donnie Lynn	66695	\$	36.75
		\$	3,354.47

**TOWN OF ALTAVISTA
UNCOLLECTED TAXES AMOUNTING
TO LESS THAN \$20.00 FOR WHICH
NO BILLS WERE SENT
AS OF AUGUST 21, 2020**

REAL ESTATE TAXES

Altavista/Lynch Creek	44527	\$	0.75
Carter, Kirk Lee Jr & Patricia	44969	\$	0.75
Dishnet Wireline	71547	\$	0.10
Emerson, Dennis	75463	\$	0.94
Johnson, Dilys T Life	46291	\$	0.94
Joybiz	72731	\$	0.94
Moore, Lyn C & Essie	46843	\$	0.94
Unknown Owner	76403	\$	6.76

PERSONAL PROPERTY TAXES
None

**TOWN OF ALTAVISTA
DELINQUENT REAL ESTATE TAXES
August 21, 2020
(RECOMMENDED WRITE-OFF)**

TAXPAYER NAME

TAX ROLL NUMBER

TAX AMOUNT



Date: August 20, 2020
To: Mayor Mattox and Members of Council
FROM: Tobie Shelton
SUBJECT: Budget Amendments / Departmental Transfers

Attached are budget amendments that are necessitated by previous Council action or the receipt of funds to cover an associated expense. The adoption of these amendments completes the process.

- CARES Act Expenditures \$ 3,080
(Revenue to be received through grant)
- State Forfeiture: Seized Funds \$ 3,630
(Revenue received through seizures)
- Byrne Grant Expenditures \$ 1,749
(Revenue received through grant)
- Payoff of 2016 Bonds/2020 Borrowing \$ 458,650
(Council Approval: March 24, 2020)
- Rt. 43 Streetscape Project \$ 908,390
(Council Approval: May 14, 2019)
- Avoca Roof Repair \$ 12,000
(Council Approval: May 12, 2020)
- WTP: Filter Improvement Project \$ 4,950
(Council Approval: October 8, 2019)
- Melinda HPZ \$ 6,500
(Council Approval: September 11, 2018)
- Electrical Services Sewer \$ 104,000
(Revenue Identified in FY 2020 Budget)
- Lynch Creek Sewer Line Project \$ 99,800
(Council Approval: October 8, 2019)
- Aeration Improvement Project \$ 19,200
(Council Approval: October 8, 2019)

- WWTP Electrical Upgrade Project \$ 157,700
(Council Approval: September 11, 2018)
- Insurance Claim \$ 6,000
(Reimbursable through insurance carrier)
- WWTP Electrical Upgrade Project \$ 157,700
(Council Approval: September 11, 2018)
- CCTV Sewer Camera Head Replacement \$ 16,400
(Council Approval: December 10, 2019)

Also attached are Departmental Transfers (from one-line item to another)

- Various Departments
(Redistribution of funds to cover operational costs – no new funds are required)



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the General Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
General Fund		
Administration		
010-1101-401.50-99	\$ 1,180.00	
Public Safety		
010-3101-501.50-99	\$ 1,780.00	
Public Works		
010-4101-601.50-99	\$ 120.00	
General Fund		
Misc. Revenue		
010-0000-351.04-00		\$ 3,080.00

Summary

Under the CARES Act, Campbell County was allocated funds to be transferred to the Town of Altavista to be spent on the Town's response to SARS-CoV-2, the virus that causes COVID-19, and its related impacts. It is anticipated that the Town will receive \$297,000 in the first round of CARES Act Funding. These funds, once received will be used to reimburse the Town for COVID-19 related costs, such as video equipment to provide virtual Council meetings, face masks, and hand sanitizer.

Budget Impact

This will result in a net increase to the budget in the amount of \$3,080.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the General Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Public Safety State Forfeiture Fund 010-3101-501.50-78	\$ 3,630.00	
General Fund Miscellaneous Revenue 010-0000-361.08-00		\$ 3,630.00

Summary

To appropriate \$3,630 to cover costs associated with drug enforcement. These funds will be transferred in from the State Forfeiture Account.

Budget Impact

This will not impact the town's budget, as these funds are handled through the State Forfeiture Account.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the General Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Police Department		
Other Charges / Byrne Justice Grant Expenses		
010-3101-501.52-04	\$ 1,749.00	
 Federal / Byrne Grant		
010-0000-343.05-00		\$ 1,749.00

Summary

Appropriate \$1,749 to cover costs of equipment and supplies purchased through the Byrne Justice Grant.

Budget Impact

There is an offsetting revenue to cover the expense.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the General Fund and Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
General Fund		
Payoff debt with CB&T		
010-4101-601.90-02	\$ 299,600.00	
Equity Contribution		
010-4101-601.90-04	\$ 2,160.00	
General Fund		
Proceeds from LTD		
010-0000-362.01-00		\$ 299,600.00
General Fund		
Transfer In / From Reserves		
010-0000-361.01-00		\$ 2,160.00
Enterprise Fund		
Bond Issuance Costs		
050-5001-701.50-88	\$ 86,060.00	
050-5101-702.50-88	\$ 56,330.00	
Equity Contribution		
050-9104-701.90-04	\$ 14,500.00	
Enterprise Fund		
Transfer In / From Reserves		
050-0000-361.01-00		\$ 156,890.00

Summary

To appropriate \$299,600 to record the payoff of the debt with CB&T and \$159,050 to cover the town's equity contribution for a portion of the payoffs of the 2016 Bonds as well as for Bond Counsel fees in order for the 2020 Bonds to be deemed designated. Council approved March 24, 2020.

Budget Impact

This will result in a net increase to the budget in the amount of \$458,650.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2019:

Section 1. To amend the General Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
General Fund		
Improvements - Rt. 43 Streetscape Project		
010-4101-803.81-30	\$ 908,390.00	
General Fund		
VDOT Map-21 Grant		
010-000-343.03-00		\$ 748,230.00
Transfer In from Designated Reserves		
010-000-361.03-01		\$ 160,160.00

Summary

To appropriate \$908,390 to partially cover the cost of the Rt.43 Streetscape Project that was awarded to Va. Carolina Paving at the May 14, 2019 Regular meeting.

Budget Impact

This will result in a net increase to the budget in the amount of \$908,390. Funds will be transferred in from designated reserves for the town's match on this project, the remaining costs will be funded by the Map 21 Grant.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2019:

Section 1. To amend the General Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
General Fund		
Improvements - Avoca Roof Repair		
010-9105-801.81-30	\$ 12,000.00	
General Fund		
Misc. Revenue - Sale of EMS Building		
010-0000-351.04-00		\$ 12,000.00

Summary

To appropriate \$12,000 to cover the cost of repairing the roof at Avoca Museum. At the April 28th Work session, it was the consensus of Council to use a portion of the proceeds from the EMS sale to fund the roof project. Formal approval of this item occurred at the May 12th Regular Council meeting.

Budget Impact

This will result in an increase to the budget in the amount of \$12,000.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the General and Enterprise Funds, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund		
Water System - WTP Filter Improvement Project		
050-5010-701.81-22	\$ 4,950.00	
Transfer in from Borrowing		
050-0000-361.01-00		\$ 4,950.00

Summary

To appropriate \$4,950 to partially cover costs associated with the design phase of the WTP Filter Improvement Project. This project is funded through the recent borrowing. Funds are drawdown from the Town's SNAP Account and transferred in to cover costs.

Budget Impact

This will result in a net increase to the budget.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund / Water CIP / Melinda HPZ Project 050-5010-701.81-35	\$ 6,500.00	
Enterprise Fund / Water Transfer in from Designated Reserves 050-0000-361.01-00		\$ 6,500.00

Summary

Council approved at their September 11, 2018 Regular Meeting to move forward with Staff's recommendation of the Melinda HPZ Project. Partial Funding for this project was carried over from the FY2019 Budget and earmarked in reserves as the engineering phase was still being completed.

Budget Impact

This will result in a net increase to the budget in the amount of \$6,500.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund Electrical Services Sewer 050-5101-702.50-02	\$ 104,000.00	
Enterprise Fund Sewer / Industrial 050-0000-333.01-00		\$ 104,000.00

Summary

Electrical costs for the WWTP have surpassed what was budgeted. An increase in revenue from industrial sewer charges has been identified to cover the costs.

Budget Impact

This will result in a net increase to the budget in the amount of \$104,000.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund		
Sewer System - Lynch Creek Sewer Line Project		
050-5110-702.81-20	\$ 99,800.00	
Enterprise Fund		
Transfer In from Borrowing		
050-0000-361.01-00		\$ 99,800.00

Summary

To appropriate \$99,800 towards costs associated with design phase of the Lynch Creek Sewer Line Project. This project is funded through the recent borrowing. Funds are drawdown from the Town's SNAP Account and transferred in to cover the costs.

Budget Impact

This will result in a net increase to the budget in the amount of \$99,800.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund		
Sewer System - Aeration Improvement Project		
050-5110-702.81-30	\$ 19,200.00	
Enterprise Fund		
Transfer In from Borrowing		
050-0000-361.01-00		\$ 19,200.00

Summary

To appropriate \$19,200 towards costs associated with the design phase of the WWTP Aeration Project. This project is funded through the recent borrowing. Funds are drawdown from the Town's SNAP Account and transferred in to cover the costs.

Budget Impact

This will result in a net increase to the budget in the amount of \$19,200.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund WWTP Electrical Upgrade 050-5110-702.81-40	\$ 157,700.00	
Enterprise Fund Transfer In from Borrowing 050-0000-361.01-00		\$ 157,700.00

Summary

To appropriate \$157,700 towards costs associated with Phase I of the WWTP Electrical Upgrade. This project is funded through the recent borrowing. Funds are drawdown from the Town's SNAP Account and transferred in to cover the costs.

Budget Impact

This will result in a net increase to the budget in the amount of \$157,700.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the General Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
General Fund		
Non-Dept. / Reimbursement of Claim		
010-9102-801.50-96	\$ 6,000.00	
General Fund		
Insurance Reimbursement of Claim		
010-0000-351.08-00		\$ 6,000.00

Summary

To appropriate \$6,000 for the repair equipment due to lightning damage.

Budget Impact

These funds are fully reimbursable after meeting the deductible.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020

**TOWN OF ALTAVISTA****BUDGET AMENDMENT**

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Highway Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Highway Fund		
CIP / Ridgeway Drainage Project		
020-4101-608.82-30	\$ 92,500.00	
Highway Fund		
Transfer in from Designated Reserves		
020-0000-361.01-00		\$ 92,500.00

Summary

Council approved at the July 9, 2019 meeting to move forward with the Ridgeway Drainage Project and the project would be funded with Highway Funds.

Budget Impact

This will result in a net increase to the budget in the amount of \$92,500.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020



TOWN OF ALTAVISTA

BUDGET AMENDMENT

BE IT ORDAINED by the Town Council of Altavista, VA, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2020:

Section 1. To amend the Enterprise Fund, as follows:

<u>Account</u>	<u>Expense</u>	<u>Revenue</u>
Enterprise Fund CIP / CCTV Sewer Camera Head Repl 050-5110-702.81-06	\$ 16,400.00	
Enterprise Fund Transfer in from Reserves 050-0000-361.01-00		\$ 16,400.00

Summary

To appropriate \$16,400 for the purchase of a CCTV Sewer Camera Head. Council approved the purchase at the December 10, 2019 meeting.

Budget Impact

This will result in a net increase to the budget in the amount of \$16,400.

Section 2. Copies of this budget amendment shall be furnished to the Clerk of the Town Council and to the Finance Director for their direction.

Adopted this 8th day of September 2020

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrrl ID#:

DT-7

See Processing Instructions BelowRequester Tobie Shelton

Required

Department
Name : Administration

Required

Date of
Request: 8/19/2020Fiscal Year: 2020

Phone #:

Email Address: tcshelton@altavistava.govReason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items**DEBIT: (Charge)**

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-1101-401.30-06	\$3,900.00	Advertising	

Total Debits: \$3,900.00**CREDIT:**

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-1101-401.30-14	-\$3,900.00	Misc. & Prof. Svcs	

Total Credits: -\$3,900.00

Total Credits and Total Debits must be equal zero.

Approvals Required:Kayla Donigan
Prepared By8/19/2020
Date434-369-5001
Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrnl ID#:

DT-8

See Processing Instructions BelowRequester Chief Merricks
RequiredDepartment
Name : Public Safety
RequiredDate of
Request: 8/19/2020 Fiscal Year: 2020Phone #: _____ Email Address: lemerricks@altavistava.govReason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items**DEBIT: (Charge)**

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-3101-501.20-16	\$2,000.00	Other Employee Benefits	
010-3101-501.50-04	\$200.00	Heating	
010-3101-501.52-04	\$1,750.00	Byrne Justice	
010-3101-501.60-04	\$160.00	Repairs & Maintenance	
010-3101-501.60-06	\$4,000.00	Fuels & Lubricants	

Total Debits: \$8,110.00**CREDIT:**

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-3101-501.50-26	-\$3,110.00	Conventions & Education	
010-3101-501.50-24	-\$5,000.00	Subsistence & Lodging	

Total Credits: -\$8,110.00

Total Credits and Total Debits must be equal zero.

Approvals Required:Koufa Gengen
Prepared By8/19/2020
Date434-369-5001
Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrrl ID#:

DT-9A

See Processing Instructions BelowRequester David Garrett
RequiredDepartment
Name : Public Works
RequiredDate of
Request: 5/26/2020 Fiscal Year: 2020Phone #: _____ Email Address: dlgarrett@altavistava.govReason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items**DEBIT: (Charge)**

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-4101-601.30-08	\$690.00	Maintenance Svc. Contracts	
010-4101-601.60-02	\$530.00	Office Supplies	
010-4101-601.60-08	\$4,500.00	Vehicle R&M	
010-4101-601.60-11	\$1,050.00	Safety Equip. & Programs	
010-4101-601.60-20	\$3,400.00	Street Light Oper Supplies	
010-4101-601.60-34	\$740.00	Train Station Supplies	
010-4102-601.60-06	\$1,500.00	Fuels & Lubricants/Sanitation	
010-4102-601.60-08	\$2,500.00	Vehicle R&M / Sanitation	
Total Debits:		\$14,910.00	

CREDIT:

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-4101-601.30-12	\$5,000.00	Eng. & Arch. Services	
010-4101-601.30-36	\$6,000.00	Mowing Contract	
010-4101-601.50-26	\$1,600.00	Conventions & Education	
010-4101-601.60-28	\$2,000.00	Storm Drainage	
010-4101-601.60-23	\$310.00	Equipment Rental	

Total Credits: \$14,910.00 **DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT**
Total Credits and Total Debits must be equal zero.**Approvals Required:**Prepared By:  Date: 8/19/20 Phone: _____

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting

Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jnl ID#:

DT-9B

See Processing Instructions BelowRequester David Garrett

Required

Department

Name: Public Works

Required

Date of

Request: 5/26/2020Fiscal Year: 2020

Phone #:

Email Address: dtgarrett@altavistava.govReason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items**DEBIT: (Charge)**

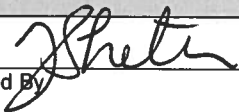
Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-4103-601.50-02	\$1,100.00	B&G Electrical Services	
010-4103-601.60-18	\$1,500.00	B&G Material and Supplies	
010-4103-601.60-24	\$160.00	B&G Small Tools	
010-4104-602.50-02	\$2,200.00	P&R Electrical Services	
010-4104-602.50-04	\$70.00	P&R Heating Services	
010-4104-602.60-18	\$9,000.00	P&R Supplies	
010-4109-601.50-04	\$600.00	EMS Bldg - Heating Services	
Total Debits:		\$14,630.00	

CREDIT:

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-4101-601.60-06	\$7,000.00	Fuels & Lubricants	
010-4104-602.60-56	\$4,800.00	War Memorial Ballfield	
010-4103-601.50-04	\$1,300.00	B&G Heating Services	
010-4104-602.60-53	\$500.00	P&R Mulch	
010-4101-601.60-40	\$1,030.00	Traffic Control Devices	

Total Credits: \$14,630.00 **DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT**
Total Credits and Total Debits must be equal zero.**Approvals Required:**

Prepared By



Date

8/19/20

Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrnl ID#:

DT-10

See Processing Instructions Below

Requester Tobie Shelton
Required

Department
Name : Transportation
Required

Date of
Request: 8/19/2020

Fiscal Year: 2020

Phone #: _____ Email Address: tcshelton@altavistava.gov

Reason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items

DEBIT: (Charge)

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-6101-403.60-02	\$130.00	Office Supplies	
010-6101-403.60-08	\$550.00	Vehicle R&M	

Total Debits: \$680.00

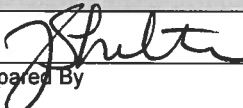
CREDIT:

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-6101-403.60-14	\$400.00	Other Operating Supplies	
010-6101-403.60-06	\$280.00	Fuels & Lubricants	

Total Credits: \$680.00 DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT

Total Credits and Total Debits must be equal zero.

Approvals Required:

Prepared By  Date 8/19/20 Phone _____

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrnl ID#:

DT-11

See Processing Instructions BelowRequester Tobie Shelton
RequiredDepartment
Name : Non-Departmental
RequiredDate of
Request: 8/19/2020 Fiscal Year: 2020Phone #: _____ Email Address: tcshelton@altavistava.govReason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items**DEBIT: (Charge)**

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-9105-801.60-06	\$40.00	Fuels & Lubricants	

Total Debits: \$40.00**CREDIT:**

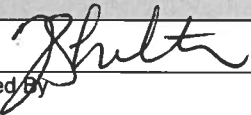
Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
010-9101-801.50-32	\$40.00	Miscellaneous	

Total Credits: \$40.00 **DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT**

Total Credits and Total Debits must be equal zero.

Approvals Required:

Prepared By



Date

8/19/20

Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting

Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jnl ID#:

DT-12

See Processing Instructions Below

Requester David Garrett

Required

Department

Name : Highway

Required

Date of

Request: 8/19/2020

Fiscal Year: 2020

Phone #:

Email Address: dgarrett@altavistava.gov

Reason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items

DEBIT: (Charge)

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
020-4101-607.50-32	\$10,000.00	Miscellaneous	

Total Debits: \$10,000.00

CREDIT:

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
020-4101-606.60-44	\$10,000.00	Snow and Ice Removal	

Total Credits: \$10,000.00 DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT

Total Credits and Total Debits must be equal zero.

Approvals Required:

Prepared By

8/19/20

Date

Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrrl ID#:

DT-13

See Processing Instructions Below

Requester Tom Fore
Required

Department
Name: Water Department
Required

Date of
Request: 8/19/2020 Fiscal Year: 2020

Phone #: _____ Email Address: twfore@altavistava.gov

Reason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items

DEBIT: (Charge)

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
050-5003-706.50-08	\$90.00	Telecommunications-McMinnis	
050-5003-707.50-08	\$100.00	Telecommunications - Reynolds	
050-5004-708.60-04	\$500.00	Materials & Supplies - Tanks	

Total Debits: \$690.00

CREDIT:

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
050-5003-706.50-02	\$90.00	Electrical - McMinnis	
050-5003-707.50-02	\$100.00	Electrical - Reynolds	
050-5003-707.60-04	-\$500.00	Repair & Main. - Springs	

Total Credits: -\$310.00 DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT
Total Credits and Total Debits must be equal zero.

Approvals Required:

Prepared By: J. Shultz Date: 8/19/20 Phone: _____

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting
Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jnl ID#:

DT-14

See Processing Instructions BelowRequester Tom Fore
RequiredDepartment
Name: Sewer Department
RequiredDate of
Request: 8/19/2020Fiscal Year: 2020Phone #: _____ Email Address: twfore@altavistava.govReason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items**DEBIT: (Charge)**

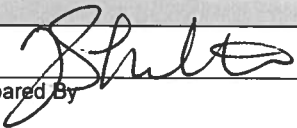
Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
050-5101-702.30-24	\$1,400.00	R&M Bldg and Grounds	

Total Debits: \$1,400.00**CREDIT:**

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
050-5101-702.30-16	\$1,400.00	Physicals	

Total Credits: \$1,400.00 **DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT**
Total Credits and Total Debits must be equal zero.**Approvals Required:**

Prepared By



Date

8/19/20

Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.

DEPARTMENTAL FUNDS TRANSFER

General Accounting

Town of Altavista, 510 7th Street, Altavista, Virginia 24517

Transfer Jrrl ID#:

DT-15

See Processing Instructions Below

Requester Tom Fore

Required

Department

Name : Collection/Distribution Department

Required

Date of

Request: 8/19/2020

Fiscal Year: 2020

Phone #:

Email Address: twfore@altavistava.gov

Reason for
Transfer:

Transfer of funds within the department to cover operational costs of the department. No new funds are required.

Excluding Salary/Wages Line Items

DEBIT: (Charge)

Account Number	Amount - Enter as Positive (+) Incr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
050-5201-711.10-04	\$500.00	Dist. Overtime	
050-5201-712.10-04	\$270.00	Coll. Overtime	
050-5201-711.20-06	\$3,000.00	Dist. Group Medical	
050-5201-712.20-06	\$3,000.00	Coll. Group Medical	
050-5201-711.60-04	\$9,900.00	Dist. R&M	
050-5201-712.60-08	\$1,100.00	Coll. Vehicle R&M	

Total Debits: \$17,770.00

CREDIT:

Account Number	Amount - Enter as Negative (-) Decr Amt	Description - REQUIRED FIELD (Limit to 30 Characters)	Reference
050-5201-711.10-02	\$500.00	Dist. Wages Regular	
050-5201-712.10-02	\$270.00	Coll. Wages Regular	
050-5201-711.30-08	\$2,500.00	Main. Svc. Contracts	
050-5201-711.30-30	\$2,400.00	Dist. GIS Mapping	
050-5201-711.50-65	\$8,000.00	Meter/Repl	
050-5201-712.30-30	\$2,400.00	Coll. GIS Mapping	
050-5201-712.60-06	\$1,700.00	Fuels & Lubricants	

Total Credits: \$17,770.00 DEBITS DO NOT EQUAL CREDITS - PLEASE CHECK ALLOCATION AMOUNT

Total Credits and Total Debits must be equal zero.

Approvals Required:

Prepared By

Twfore

Date

8/19/20

Phone

Departmental Funds Transfer was approved at the Regular Council Meeting held on June 10, 2014.



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Items/Unfinished Items

MEETING DATE:

August 25, 2020

ITEM #: 6f**ITEM TITLE:**

FY2021 Budget Amendment Public Hearing

DESCRIPTION:

Due to recent items (USDA Grant, CARES Act funding, etc.), the FY2021 Adopted Budget may see an increase in excess of 1% which pursuant to the Code of Virginia requires a public hearing. Staff is working on drafting the notice of the public hearing to include all of changes. At this time, staff requests that Town Council schedule a public hearing for Tuesday, October 13, 2020 for Consideration of Budget Amendments to the FY2021 Adopted Budget. The actual budget amendments will be provided prior to the meeting. [\(LINK\)](#)

RECOMMENDATION:

Authorize staff to schedule a public hearing for Consideration of Budget Amendments to the FY2021 Adopted Budget.

BUDGET/FUNDING:

Budget will be increased by greater than 1%.

POTENTIAL ACTION:

- Per Council's discussion:
 - Motion to authorize the Town Manager to schedule/advertise a public hearing for Consideration of Budget Amendments to the FY2021 Adopted Budget.
 - Defer action and place on a future meeting agenda.
 - Take No Action.

ATTACHMENTS:

- Code of Virginia §15.2-2507 A. [\(LINK\)](#)

§ 15.2-2507. Amendment of budget

A. Any locality may amend its budget to adjust the aggregate amount to be appropriated during the current fiscal year as shown in the currently adopted budget as prescribed by § 15.2-2504. However, any such amendment which exceeds one percent of the total expenditures shown in the currently adopted budget must be accomplished by publishing a notice of a meeting and a public hearing once in a newspaper having general circulation in that locality at least seven days prior to the meeting date. The notice shall state the governing body's intent to amend the budget and include a brief synopsis of the proposed budget amendment. Any local governing body may adopt such amendment at the advertised meeting, after first providing a public hearing during such meeting on the proposed budget amendments.

B. Pursuant to the requirements of §§ 15.2-1609.1, 15.2-1609.7, 15.2-1636.8, and 15.2-1636.13 through 15.2-1636.17 every county and city shall appropriate as part of its annual budget or in amendments thereto amounts for salaries, expenses and other allowances for its constitutional officers that are not less than those established for such offices in the locality by the Compensation Board pursuant to applicable law or, in the event of an appeal pursuant to § 15.2-1636.9, by the circuit court in accordance with the provisions of that section.

1983, c. 319, § 15.1-162.1; 1984, c. 523; 1997, cc. 587, 602; 2007, c. 297.

The chapters of the acts of assembly referenced in the historical citation at the end of this section may not constitute a comprehensive list of such chapters and may exclude chapters whose provisions have expired.



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Business

MEETING DATE:

August 25, 2020

ITEM #: 6g**ITEM TITLE:**

Recreation Committee Request

DESCRIPTION:

At the August 18, 2020 Recreation Committee meeting, staff was asked to refer three (3) items to Town Council.

1. Eagle Trail and Green Hill Trail Connector

The Recreation Committee would like to use unexpended funds from the Green Hill Trail connector project to complete the gravel connection to English Park. The cemetery connector had a budget of \$20,000. The town spent \$6,640 on the design and construction and \$3,394.47 for the construction of the bridges along the trail, which was a Boy Scout Eagle Project. A balance of \$9,965.53 remains earmarked for this project. A location map is attached. [\(LINK\)](#)

Staff has received 2 quotes in response to its solicitation. [\(LINK\)](#)

Crews Construction & Asphalt Co., Inc. - \$10,885.20

Guy P. Riddle, Inc. - \$16,000

If Town Council decides to move forward with the connection and used the balance left from the Green Hill Trail connector, there would still be a shortfall of \$919.67.

2. Dead Ash Trees at English Park

The Recreation Committee asked Public Works if the dead and dying Ash trees in English Park could be removed. Public Works has identified 50-70 tree that should be removed. Staff will need to solicit quotes for the work, if Town Council desires to have the trees removed.

3. English Park Large Field Improvements – Phase I and Request for Eagle Trail Bicycle Turnaround

Staff provided an update on the English Park Large Field Improvement project identified for completion in the Capital Improvement Plan (CIP) for Fiscal Year 2021. The fields have been reseeded and will continue to be monitored by Public Works. To complete Phase I, the two small parking lots at English Park will need to be paved. Staff is in the process of obtaining quotes for the paving and will provide the information at the meeting, if available. A location map is attached. [\(LINK\)](#)

The Recreation Committee discussed a request received from a citizen concerning a bicycle turnaround at the end of Eagle Park Trail. It was explained that cyclist must stop, get off their bicycles, and turn them around at the end of the trail. If a small bulb were provided, it would make it easier for cyclist using the trail. The Public Works Director stated that it might be possible to have a small blub placed at

the end of the trail when the small parking lots are paved, if Town Council approves the recommendation.

RECOMMENDATION:

Provide direction to staff.

BUDGET/FUNDING:

1. There are funds available for the connector project; however, there is a shortfall of \$919.67.
2. Staff would need to obtain quotes for the ash tree removal. The Virginia Department of Forestry (VDOF) is offering financial assistance to remove such trees from the public landscape. Information regarding the Ash Removal and Replacement Cost-Share Program is provided below.
 - Local governments are eligible to apply for funding and the program is a 50% cost-share program.
 - To qualify, trees need to be at least 17 inches around at breast height and be exhibiting more than 30% canopy loss.
 - Applications will need to include a removal quote or bid from an International Society of Arboriculture (ISA) certified arborist.
 - The program will cover 50% of the total removal costs as a reimbursement, limited to \$6,150 per organization or \$30 per diameter inch and will include an incentive payment of \$200 for replacement of every tree removed under the program, up to \$1,200.
 - The town would be responsible for buying and planting all replacement trees and then reporting each tree planted on VDOF's Trees Count survey application.
 - The application deadline is September 10, 2020.
3. The paving of the parking lots was included in the adopted budget for Fiscal Year 2021.

POTENTIAL ACTION:

Per discussion of Town Council.

ATTACHMENTS:

1. Quotes for trail connector ([LINK](#))
2. Trail location map ([LINK](#))
3. Pictures of ash trees at English Park ([LINK](#))
4. Parking lot map ([LINK](#))
5. Picture at the end of Eagle Trail ([LINK](#))

EAGLE TRAIL AGGREGATE WALKING TRAIL PROPOSAL

August 19, 2020



Proposal

Proposal Submitted to: David Garrett
Public Works Director
Town of Altavista

Proposal No: 2

Date: August 19, 2020

Work To be Performed at: English Park

Charles Burger
Crews Construction Company Inc.
14001 Mount Cross Road
Dry Fork, Virginia 24549
434-724-7920 (p)
434-770-5559 (m)
434-724-2662 (f)
burgercc@yahoo.com

Project: aggregate walking trail

We propose to furnish the materials and perform the labor necessary for the completion of the following tasks:

Description	Dollar Amount
<p><u>Option #1: Aggregate walking trail approximately 965' x 10' & 25' x 5' with 3" compacted of Va. 21 A stone</u></p> <ul style="list-style-type: none"> - Minimal shaping of existing contour at walking trail spur connection, to the right of mainline trail, to allow for sheet flow of storm water - Install Mirafi 500x woven geotextile fabric as a base stabilizer then install 3" compacted of Va. 21 A stone at a width of 10' on mainline and at a width of 5' on walking trail spur connecting to bridge 	\$ 9.77 per foot
<p><u>Option #2: Aggregate walking trail approximately 965' x 10' & 25' x 5' with 4" compacted of Va. 21 A stone:</u></p> <ul style="list-style-type: none"> - Minimal shaping of existing contour at walking trail spur connection, to the right of mainline trail, to allow for sheet flow of storm water - Install Mirafi 500x woven geotextile fabric as a base stabilizer then install 4" compacted of Va. 21 A stone at a width of 10' on mainline and at a width of 5' on walking trail spur connecting to bridge 	\$11.28 per foot
<p><u>Project Specific Notes:</u></p> <ul style="list-style-type: none"> - Owner is responsible for removal of any debris/materials on trail prior to start of work 	

	<ul style="list-style-type: none"> - Installing Mirafi 500x on <u>existing terrain</u> may be irregular in shape and not uniform due to variations in the terrain - <i>This price does not include under-cut of sub-grade or removal of unsuitable materials due to the following situations: root infiltration, bed-rock or inadequate soil conditions in sub-grade. In the event of having to make an undercut beyond the sub-grade depth required for stone and asphalt, the unsuitable material will be cutout, disposed of, then back-filled and compacted with Va. #21A stone at \$56.00 per cubic yard measured.</i> 	
--	--	--

NOTES

No Saw Cutting
No Prime of Stone

No Testing
No Bond or Permits

No Density Testing
No Weekends

Includes Traffic Control

If any additional stone is installed the cost will be \$40/ton. If Crews does not install stone, we expect the grade to be +/- 0.25 of being on finished grade and in an unyielding condition.

We have priced this quote to the best of our ability. Price is good for 30 days. In the event the sub grade area is unsuitable for the stone base; price adjustments may be necessary. In case this is necessary the owner would be notified before proceeding. This clause is to protect the owner and the contractor to create the best-looking job that will be enjoyed for years to come. PAYMENT IS DUE UPON COMPLETION OF THE JOB.

Acceptance of proposal: The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to complete this contract as specified. **If you agree to this proposal, please sign below and return one copy to our office to be added to our schedule.**

Signature: _____ **Date:** _____

GUY P. RIDDLE, INC.

EXCAVATING

Guy P. Riddle, Inc.

421 Fairview Road
Chatham, Virginia 24531
Phone (434) 432-8181
Fax (434) 432-2411

June 26, 2020

**David Garrett
Town of Altavista**

Re: Proposal for Walking Trail.

Base Bid: \$16,000.00

SCOPE OF WORK:

**Place and compact 4" X 10' X 1000' 21-A Base Stone with woven GEO-
Textile Fabric underneath.**

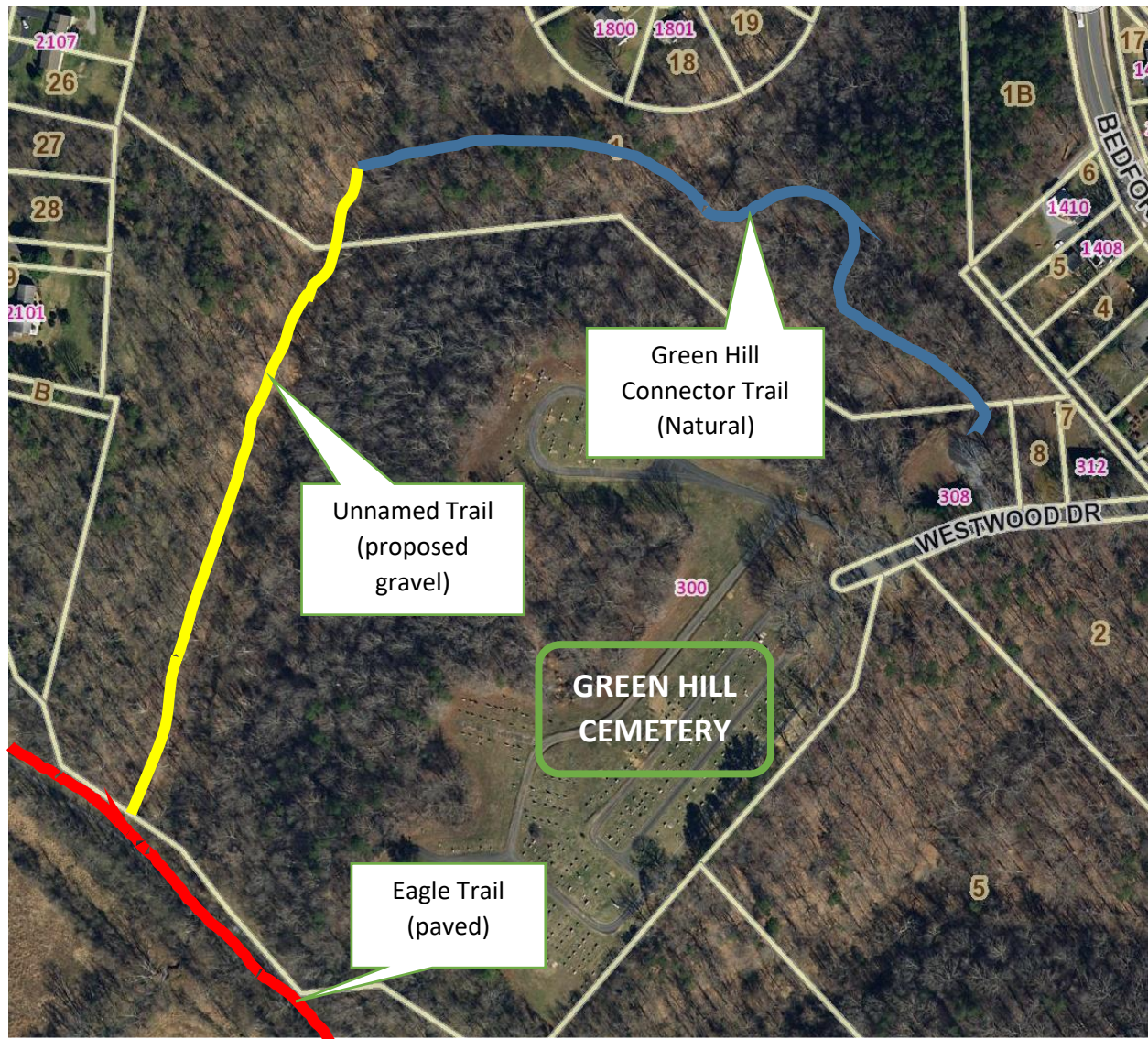
EXCLUSIONS: Permits, bonds, E & S, seeding, straw.

**Guy P. Riddle, Inc.
Norman Y. Riddle
vp**

Eagle Trail Aggregate Walking Trail Proposal Review
--

Crews Construction & Asphalt Paving Co., INC	\$10,885.20
Guy P. Riddle, INC.	\$16,000.00

Project Cost	\$10,885.20
Left over funds from Green Hill Trail	\$9,965.53
Additional funds needed	-\$919.67



Yellow Line: Unnamed trail (Proposed gravel surface)

Blue Line: Greenhill Connector Trail (Natural path surface)

Red Line: Eagle Trail (Asphalt surface)

Ash Trees at English Park 75±







English Park Parking Lot Paving Project (FY2020 CIP project)

- Includes paving, striping and signage.

Part of the “English Park Large Field Improvements Phase 1” CIP Project, which has \$90,000 of general funds allocated in the FY2020 Adopted Budget.



Terminus of Eagle Trail – Proposed area for paved bike turnaround.



TOWN OF ALTAVISTA TOWN COUNCIL AGENDA COVER SHEET

AGENDA LOCATION:

New Items/Unfinished Items

MEETING DATE:

August 25, 2020

ITEM #: 6h**ITEM TITLE:**

Altavista Police Vehicle Marking Update/Request

DESCRIPTION:

Attached please find a memorandum from Chief Merricks providing an update on the purchase of a new departmental vehicle and a diagram on how we would like to have this vehicle marked. [\(LINK\)](#)

RECOMMENDATION:

Per discussion of Town Council.

BUDGET/FUNDING:

Funds are included in the FY2021 Budget for this CIP item.

POTENTIAL ACTION:

- Per Council's discussion:
 - Consensus of Council as to the marking of police vehicles.
 - Provide staff input as to any items Council would like to see addressed/researched.
 - Defer action and place on a future meeting agenda.
 - Take No Action.

ATTACHMENTS:

- Chief Merrick's memo with vehicle marking diagram [\(LINK\)](#)

8-20-2020

To Waverly Coggsdale, Town Manager

From T E Merricks, Chief of Police

RE: Council Input on marking new Police Vehicle

Waverly,

As included in the 2021 CIP, we purchased a new 2020 Police Vehicle and have received it. There was some discussion on Council a while back about purchasing white vehicles as they were cheaper, so that is what I did. Attached to this email is a mock up of the way I would like to mark the vehicle, which is similar to the markings we have now, but does not use the black and white. There is one addition I would like to make, and that is to add the National Motto, "In God We trust" to the back of the vehicle.

In these trying times, it is my belief that the display of this would help solidify our commitment to the community. There is a legal opinion from a past Attorney General that states display of that is not an infringement of the first amendment establishment clause.

If you see fit, would you please add this to a upcoming agenda so we may proceed.

Thank you for your consideration,

TEM

