

Shelby City Council Agenda
Regular Meeting
July 20, 2026, at 6:00 p.m.

City Hall Council Chambers
300 South Washington Street
Shelby, North Carolina

Welcome and Call to Order by Mayor O. Stanhope Anthony, III

Invocation

Pledge of Allegiance

A. Approval of Agenda

Discussion and revision of the proposed agenda, including consent agenda; adoption of an agenda.

- 1) Motion to adopt the agenda as proposed or amended

B. Special Presentation:

1 - 6

- 1) GFOA Certificate of Achievement for Excellence in Financial Reporting, Mayor Anthony presenting to Finance Director Beth Beam

C. Public Comment:

7

In accordance with City Council's policy, public comment is only taken at the second regular meeting each month. Any citizen who wishes to address Council must register with the City Clerk prior to 6:00 p.m. on the meeting night. The Mayor will call upon each individual during this portion of the meeting and will allow three (3) minutes to speak.

D. Public Hearing:

- 1) Consideration of a resolution adopting the Imagine Shelby Comprehensive Plan: Resolution No. 42-2026 (Brian Burgess presenting)

8 - 12

E. Consent Agenda:

Prior to approval and adoption of the agenda, a Council Member may move an item from the Consent Agenda to the regular agenda. Items remaining on the Consent Agenda will be considered collectively through a single motion and vote.

- | | |
|---|---------|
| 1) Approval of the Minutes of the Regular Meeting of June 15, 2026 | 13 - 22 |
| 2) Approval of a reimbursement resolution with regard to Installment Financings for FY 2026-2027: Resolution No. 43-2026 | 23 - 27 |
| 3) Approval of a resolution to accept an offer to purchase property by upset bid process (417 Clegg St.): Resolution No. 44-2026 | 28 - 34 |
| 4) Approval of a resolution to accept an offer to purchase property by upset bid process (608 LeGrand St.): Resolution No. 45-2026 | 35 - 41 |
| 5) Approval of a resolution to accept an offer to purchase property by upset bid process (Beam St.): Resolution No. 46-2026 | 42 - 48 |
| 6) Approval of a resolution authorizing disbursement of Travel and Tourism funding for Fiscal Year 2026-2027: Resolution No. 47-2026 | 49 - 56 |
| 7) Approval of a resolution supporting the City of Shelby's Opportunity Zone 2.0 nomination of Census Tract 37045951100: Resolution No. 48-2026 | 57 - 63 |
| 8) Special Event applications: | 64 |
| a) Shelby High School Homecoming Parade, requested date: October 9, 2026 | 65 - 70 |
| b) Trunk or Treat at the Boardwalk, requested date: October 31, 2026 | 71 - 76 |
| c) Small Business Pop-Up Market and Christmas Tree Lighting, requested date: November 28, 2026 | 77 - 84 |
| d) Shelby Christmas Parade, requested date: December 6, 2026 | 85 - 91 |

9) Management Report: 92 - 127

a) Financial Summary – May 2026

END OF CONSENT AGENDA

F. Unfinished Business: 128

None

G. New Business:

- 1) Adoption of FY 2026-2027 Budget Ordinance Amendment No. 1 129 - 144
(Cemetery Perpetual Fund): Ordinance No. 33-2026 (Charlie
Holtzclaw, presenting)

H. City Manager's Report 145

I. Council Announcements and Remarks 145

J. Adjournment: 145

*To adjourn a meeting of City Council, a majority of the Council
Members must vote for a motion to adjourn.*

- 1) Motion to adjourn

City of Shelby
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B. Special Presentations:

Agenda Item B-1

- 1) GFOA Certificate of Achievement for Excellence in Financial Reporting,
Mayor Anthony presenting to Director of Finance Beth Beam

Presenting: (Stan Anthony, Mayor)

- Memorandum dated June 22, 2026, from Beth Beam, Director of Finance to Justin Merritt, City Manager
- Letter from GFOA to Mayor Anthony
- Certificates
- News Press Release

City Manager's Recommendation / Comments

The City has achieved this award dating back more than 25 years and it is a testament to the commitment of past and present management and finance directors to full public disclosure and communication of the financial condition of the City of Shelby. As I do every year, I urge you to pay close attention to the Annual Comprehensive Financial Report (ACFR). A hard copy is routinely provided to Council at the time the audit is presented and an electronic PDF version of the ACFR is maintained on the City's website. It can be found at www.cityofshelby.com under the Finance Department heading.

Please join me in congratulating the Finance Department staff for their excellent work on behalf of the citizens of Shelby.



To: Justin Merritt, City Manager

From: Beth B. Beam, Director of Finance

Date: June 22, 2026

Subject: FY25 GFOA Certificate of Achievement for Excellence in Financial Reporting

Background:

The GFOA established the Certificate of Achievement for Excellence in Financial Reporting Program in 1945 to encourage and assist state and local governments to go beyond the minimum requirements of generally accepted accounting principles to prepare annual comprehensive financial reports that evidence the spirit of transparency and full disclosure and then to recognize individual governments that succeed in achieving that goal. The ultimate goal of the program is to ensure that users of the City's financial statements have the information they need to assess the financial health of the City.

Review:

In December 2025, the Director of Finance submitted application to the GFOA for the annual comprehensive financial report for Fiscal Year ending June 30, 2025. On June 8th, 2026, the City was notified of the successful award for the annual financial report for FY25. The Certificate for Achievement is the highest form of recognition in the area of governmental accounting and financial reporting, and its attainment represents a significant accomplishment by a government and its management. This is the twenty-ninth year that the award has been received by the City of Shelby.

Recommendation:

It is requested that the Mayor congratulate the City of Shelby's Finance Department as recipients of the Certificate of Achievement for Excellence in Financial Reporting awarded by the Government Finance Officers Association for the Fiscal Year ended June 30, 2025. Members of the Finance Department will be in attendance.



Government Finance Officers Association
203 North LaSalle Street, Suite 2700
Chicago, Illinois 60601-1210
312.977.9700 fax: 312.977.4806

6/8/2026

O. Stanhope Anthony
Mayor
City of Shelby, North Carolina

Dear O. Stanhope:

We are pleased to notify you that your annual comprehensive financial report for the fiscal year ended June 30, 2025 qualifies for GFOA's Certificate of Achievement for Excellence in Financial Reporting. The Certificate of Achievement is the highest form of recognition in governmental accounting and financial reporting, and its attainment represents a significant accomplishment by a government and its management.

When a Certificate of Achievement is awarded to a government, an Award of Financial Reporting Achievement (AFRA) is also presented to the individual(s) or department designated by the government as primarily responsible for its having earned the Certificate. This award has been sent to the submitter as designated on the application.

We hope that you will arrange for a formal presentation of the Certificate and Award of Financial Reporting Achievement, and give appropriate publicity to this notable achievement. A sample news release is included to assist with this effort.

We hope that your example will encourage other government officials in their efforts to achieve and maintain an appropriate standard of excellence in financial reporting.

Sincerely,

Michele Mark Levine
Director, Technical Services



Government Finance Officers Association

Certificate of Achievement for Excellence in Financial Reporting

Presented to

**City of Shelby
North Carolina**

For its Annual Comprehensive
Financial Report
For the Fiscal Year Ended

June 30, 2025

and issued to the public 168 days after the fiscal year end

Christopher P. Morill

Executive Director/CEO



The Government Finance Officers Association of
the United States and Canada

presents this

AWARD OF FINANCIAL REPORTING ACHIEVEMENT

to

Finance Department
City of Shelby, North Carolina



The Award of Financial Reporting Achievement is presented by the Government Finance Officers Association to the department or individual designated as instrumental in the government unit achieving a Certificate of Achievement for Excellence in Financial Reporting. A Certificate of Achievement is presented to those government units whose annual financial reports are judged to adhere to program standards and represents the highest award in government financial reporting.

Executive Director

Christopher P. Morill

Date: 6/8/2026



GOVERNMENT FINANCE OFFICERS ASSOCIATION
NEWS RELEASE

FOR IMMEDIATE RELEASE

6/8/2026

For more information contact:
Michele Mark Levine, Director/TSC
Phone: (312) 977-9700
Fax: (312) 977-4806
Email: mlevine@gfoa.org

(Chicago, Illinois)—Government Finance Officers Association of the United States and Canada (GFOA) has awarded the Certificate of Achievement for Excellence in Financial Reporting to **City of Shelby** for its annual comprehensive financial report for the fiscal year ended June 30, 2025. The report has been judged by an impartial panel to meet the high standards of the program, which includes demonstrating a constructive "spirit of full disclosure" to clearly communicate its financial story and motivate potential users and user groups to read the report.

The Certificate of Achievement is the highest form of recognition in the area of governmental accounting and financial reporting, and its attainment represents a significant accomplishment by a government and its management.

Government Finance Officers Association (GFOA) advances excellence in government finance by providing best practices, professional development, resources, and practical research for more than 25,000 members and the communities they serve.

City of Shelby
Agenda Item Summary
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C. Public Comment:

In accordance with City Council's policy, public comment is only taken at the second regular meeting each month. Any citizen who wishes to address Council must register with the City Clerk prior to 6:00 p.m. on the meeting night. The Mayor will call upon each individual during this portion of the meeting and will allow three (3) minutes to speak.

Members of the public are asked to sign up prior to the meeting indicating their name and street address for the record. Members of the public are asked to print your name and address so that the Mayor may appropriately recognize you.

A reminder that it has been past practice of City Council to only listen to public comment without reply except to refer citizens with requests and concerns to the Office of the City Manager so that they may be addressed in a timely fashion or included on a future agenda for consideration by Council, if this is warranted and directed by City Council.

City of Shelby
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D. Public Hearing:

Agenda Item: D-1

- 1) Consideration of a resolution adopting the Imagine Shelby Comprehensive Plan: Resolution No. 42-2026 (Audrey Godfrey presenting)

Public Hearing Item: (Audrey Godfrey, Senior Planner)

Summary of Available Information:

- Memorandum dated July 14, 2026, from Brian Burgess, Director of Planning to Justin Merritt, City Manager
- Resolution No. 42-2026

City Manager's Recommendation / Comments

The Comprehensive Land Use Plan being presented this evening is the culmination of two (2) years of public engagement, stakeholder input, staff reviews and City Council feedback, all of which has been instrumental in development of this plan. The Comprehensive Land Use Plan is a guiding document that will be used to advance coordinated, efficient and sustainable growth within the City. It is important to recognize that this is a guide, however, it is not law. This plan will influence the Unified Development Ordinance (UDO), which is the development law, and is currently in the early stages of the revision process.

It is also important to note that this document should be updated regularly, which should consist of an annual review, with a detailed update within five (5) years of adoption.

It is my recommendation that Resolution No. 42-2026 be adopted and approved by City Council at this time.

TO: Mr. Justin Merritt, City Manager

FROM: Brian Burgess, Director of Planning & Development

DATE: July 14, 2026

SUBJECT: Comprehensive Land Use Plan Adoption

Background

In July of 2024 the City began its Comprehensive Plan process with Stewart and Boudreaux, two consulting firms who worked jointly on the project. The comprehensive plan is a guiding document for decision-making and investments but is not law. The plan typically looks 10-20 years ahead, establishes a vision & goals for Shelby's future, and offers recommendations for how to make the vision & goals a reality. From September to December of 2024 the consultants and staff worked to get input from a wide variety of stakeholders throughout the community. Upon completion of that outreach staff and the consultants worked on drafting the plan, with a second round of public input taking place in July of 2025. October of 2025 was the first time this document was presented to Council, and staff was directed to hold a work session with Council to go over details of the plan. This took place in early December of 2025. This work session led to some revisions and additional staff review which took place from January 2026 until June. Staff feel this document is ready for a final public hearing and to be considered by Council for final adoption.

It is important to note that a best practice regarding this plan is to revisit it often and revise it as needed. This should consist of an annual review, and a more detailed update at least every five years. This document is intended to be dynamic, responsive to the goals of our citizens, and sensitive to the context the City finds itself in as conditions change and emerge.

Recommendation

City Staff recommend the adoption of the Imagine Shelby Comprehensive Plan after the consideration of any public input provided at the scheduled hearing.

Attachments

- Draft Imagine Shelby Plan

RESOLUTION NO. 42-2026

A RESOLUTION ADOPTING THE IMAGINE SHELBY COMPREHENSIVE PLAN

WHEREAS, the Shelby City Council has determined that the adoption of a comprehensive plan is in the public interest and is an effective means to guide the growth and development of the City, to protect the health, safety, and welfare of its citizens, and to fulfill the City's planning objectives; and

WHEREAS, a draft comprehensive plan titled "Imagine Shelby" has been prepared and previously presented on October 20th, 2025, and December 8th, 2025; and

WHEREAS, the plan presents a long-range policy framework for land use, transportation, housing, economic development, parks and recreation, environmental stewardship, community character, and other elements of urban and community development within the City; and

WHEREAS, the Plan has been developed through a collaborative process including City staff, consultants, the Planning Board, the public, stakeholder groups, and other interested parties; and

WHEREAS, the Council finds that the Plan is consistent with the City of Shelby's goals, vision and values and is appropriate for guiding future decisions regarding land use, infrastructure, capital improvements, and community investments; and

WHEREAS, the Council has reviewed the Plan, held the required public hearing as required by the North Carolina General Statutes and the City's ordinances, and provided an opportunity for public comment; and

WHEREAS, the Council finds that adoption of the Plan will advance the coordinated, efficient, and sustainable growth of the City, preserve and enhance the City's livability and competitiveness, and promote the general welfare of its residents, businesses, and visitors.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SHELBY, NORTH CAROLINA:

1. The Imagine Shelby Comprehensive Plan is hereby adopted as the official comprehensive plan of the City of Shelby.
2. The City Manager, Director of Planning & Development, and other appropriate City staff are hereby directed to implement the policies, strategies and recommendations set forth in the Plan, consistent with applicable law, available resources, and the priorities of the Council.
3. The Council recognizes that the Plan is a guiding document and that implementation will require periodic review, refinement, updates, and amendments. The Council therefore commits to review progress annually (or

at such intervals as it deems appropriate) and to initiate such updates or amendments to the Plan as necessary or desirable.

4. This resolution shall become effective immediately upon its adoption by the City Council.

Adopted and approved this the 20th day of July, 2026.

O. Stanhope Anthony III
Mayor

ATTEST:

Carol Williams, NCCMC
City Clerk

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E. Consent Agenda:

Agenda Item: E-1

- 1) Approval of the Minutes of the Regular Meeting of June 15, 2026

Consent Agenda Item: (Carol Williams, City Clerk)

Summary of Available Information:

Please read and offer changes as you deem necessary.

- Minutes of the Regular Meeting of June 15, 2026

City Manager's Recommendation / Comments

Approve the minutes as presented or as amended by the Mayor and City Council via the Consent Agenda.

MINUTES

**Regular Meeting of Shelby City Council
City Hall Council Chambers**

**June 15, 2026
Monday, 6:00 p.m.**

Present: Mayor O. Stanhope Anthony, III, presiding; Council Members Andrew Hopper, Sr., Emilie Bullock, David White, Violet Arth and Charles Webber; City Manager Justin S. Merritt, Assistant City Manager Ben Yarboro, Assistant City Manager Kerri Melton, City Attorney Jason Lunsford, City Clerk Carol Williams, Deputy City Clerk Breanna Jones, Director of Finance Elizabeth (Beth) Beam, CPA, Chief of Police Brad Fraser, Director of Planning and Development Services Brian Burgess, Director of Parks and Recreation Charlie Holtzclaw, Public Works Director Scott Black, Public Information/Communications Officer Chip Nuhrah, Paralegal Nicole Hart, Battalion Fire Chief David Vanhoy and Energy Services Operations Manager Ronnie Davis

Absent: Council member Lori Waris

Mayor Anthony called the meeting to order at 6:00 p.m. and delivered the invocation.

Mr. Hopper led the Pledge of Allegiance.

A. Approval of agenda:

Mayor Anthony asked Council to consider adding Consent Agenda Item E-10 to the agenda (Resolution No. 41-2026), and the revised version of Resolution No. 40-2026 under Unfinished Business Item F-2(c).

Motion to adopt the proposed agenda as amended.

ACTION TAKEN: Upon a motion by Mr. Hopper, City Council voted unanimously to approve the agenda as amended, adding Item E-10 to the Consent agenda, and amending Resolution No. 40-2026 under Unfinished Business item F-2(c).

B. Special Presentations:

- 1) Proclamation recognizing July as Parks and Recreation Month – Mayor Anthony, presenting**

Mayor Anthony proudly read the proclamation and stated the City is very proud of our Parks and Recreation Department.

- 2) Uptown Shelby Association (USA) update – Carly Bostic, Executive Director**

Mrs. Bostic's update included the following information:

- **Installing string lights in some Uptown alleyways for safety and aesthetics**
- **Uptown Shelby welcomed 10 new businesses that have brought 16 full-time and 19 part-time jobs this year and three business expansions**
- **Statistics for 2025 include the following:**
 - **13,861 people come to Shelby daily for employment**
 - **2,148 people live and work in Shelby daily**
 - **7,194 people exit Shelby daily for work**
 - **92% more people enter Shelby daily than exit**
 - **16,009 people either enter or live and work daily in Shelby**
- **Statistics for 2026 include the following:**
 - **14,252 workers enter Shelby Daily for employment**
 - **2,147 people both live and work in Shelby daily**
 - **7,222 people exit Shelby daily for work**
 - **Almost twice as many workers enter Shelby than exit daily for employment, which are potential Uptown Shelby consumers**
 - **Shelby generates 59.9% of Cleveland County's annual retail sales, but it only accounts for 21.7% of the Cleveland County population**
 - **Shelby produces a disproportionate amount of retail sales relative to its population**
 - **Walkability score increased from 74 in 2025 to 77 in 2026**
- **Uptown Shelby averages around 2.4 million visitors a year since 2023**
- **Christmas update:**
 - **A total of 1,300 visitors from 4 pm to 9 pm for the Shop Small Saturday Pop Up Market, which hosted 34 small local businesses.**
 - **There were an estimated 6,000 people who came through Uptown during Shop Small Saturday from 10 am – 4 pm.**
 - **The annual Christmas Tree lighting was a success, and USA had the wonderful Dancing Fleas Band for entertainment, the Crest High School Acapella Group, and Hope worship leader, along with visits with Santa at the Santa House. This event took place on November 29th, 2025, and had an average of 500 attendees.**
 - **75 entries for the 2025 Uptown Shelby Christmas Parade and an estimated 4,000 visitors from 1 pm – 6 pm on November 30, 2025.**
 - **Making changes to the Christmas Parade for 2026, will be different than just straight down Lafayette Street.**
- **Marketing Numbers:**
 - **Uptown Shelby Association's Facebook Page was at 12,000 followers at the end of December 2025 to 12,600 as of June 2026.**
 - **Uptown Shelby Association's Instagram Page went from 4,800 at the end of 2025 to 5,600 as of June 2026.**
 - **The Uptown Insider, the monthly email newsletter, went from 1,279 subscribers in December 2025 to 1,560 currently.**

- **Social Media Campaigns:**
 - This Weekend in Uptown Shelby gives people a list of what's going on in Uptown Shelby each weekend
 - Meet the Team Monday – spotlights an Uptown Shelby Association board member
 - Gift ideas from local merchants during holiday shopping season
 - 27 Questions: Get to know the people that work in Uptown Shelby
- **Welcome Day** – promoting Uptown Shelby to Gardner-Webb University and Cleveland Community College students as they move into the area.
- **Social District update:**
 - To date, Uptown Shelby Association has received positive feedback regarding the program and has 28 total merchants participating in the program.
- **Uptown Shelby Community Workshop:**
 - Uptown Shelby Association has continued their partnership with the City of Shelby Police Department to host quarterly community meetings. These meetings are led by Officer Matt Melvin, who addresses City of Shelby PD updates, and USA updates the property owners and merchants on information, grants, and event details.
 - The first meeting took place on March 31st, with about 18 people attending. The next one will take place on Tuesday, June 16th, with tentatively 40 people attending.
- **Looking Ahead:**
 - Second Floor Residential Studies
 - Economic Vitality Video Series: Why shopping local matters
 - Uptown Shelby Business Recruitment pitchbook
 - Uptown Holiday Décor Updates
 - Updated Uptown Shelby Map/Area Guides

C. Public Comment:

- 1) Heather Tullos, 1300 Lackey Street, Shelby, North Carolina spoke about increasing police training due to the incidents that have occurred in the City recently. Ms. Tullos mentioned the benefits of Community Policing and that budgeted money should go towards this initiative. Ms. Tullos is hopeful for a positive outcome and hopes Shelby can be a city that leads by example and gains attention for safety and hospitality.
- 2) Jimmy Ruff, 1107 Holder Drive, Shelby, North Carolina spoke about the lack of playgrounds on the south side of the City. He is concerned about the children playing in the street and fears a child will get hurt if something doesn't improve.

D. Public Hearing:

- 1) Consideration of a resolution and order permanently closing a portion of Bowman Street: Resolution No. 38-2026

Presenting: Brian Burgess, Planning and Development Services Director:

- On May 18th City Council approved two resolutions regarding this item, the Resolution of Petition Acceptance and the Resolution of Intent. The public hearing was advertised and scheduled for tonight.
- The request is to close the southern portion of Bowman Street that is between W. Marion Street and W. Warren Street.
- City Council approved the closure of the northern portion of Bowman Street on August 21st, 2023.
- Currently the only dwellings on Bowman Street are the apartments at the south end of the street at Warren Street.

Mayor Anthony opened the public hearing at 6:23 p.m. and the public offered no comments.

Mayor Anthony closed the public hearing at 6:24 p.m.

Mr. White, Dr. Webber and Mr. Hopper each commented about how the closing of Bowman Street should have been handled differently.

ACTION TAKEN: Upon a motion from Ms. Arth, City Council voted 4 – 1 (Hopper opposed) to approve Resolution No. 38-2026 entitled, “A RESOLUTION AND ORDER PERMANENTLY CLOSING A PORTION OF BOWMAN STREET.”

E. Consent Agenda:

Mayor Anthony presented the consent agenda. Mr. Hopper moved to approve the consent agenda, and the following items were unanimously adopted:

- 1) Approval of the Minutes of the Special Meeting of May 28, 2026
- 2) Approval of the Minutes of the Regular Meeting of June 1, 2026
- 3) Approval of a resolution authorizing the sale of City of Shelby owned real property identified by parcel number 26514 through the upset bid procedure of N. C. General Statute § 160A-269: Resolution No. 39-2026
- 4) Storm Helene FEMA Grant Project Budget Amendments:

- a) Adoption of a budget ordinance amendment for the City of Shelby's Storm Helene FEMA Grant Project: Ordinance No. 25-2026
- b) Adoption of a budget ordinance amendment for the City of Shelby's Wease Sewer Aerial Replacement Project: Ordinance No. 26-2026
- 5) Adoption of a budget ordinance amendment for the City of Shelby's Foothills Commerce Center Sidewalk Project: Ordinance No. 27-2026
- 6) Adoption of FY 2025-2026 Budget Ordinance Amendment No. 11: Ordinance No. 28-2026
- 7) Adoption of FY 2025-2026 Budget Ordinance Amendment No. 12: Ordinance No. 29-2026
- 8) Special Event application:
 - a) Pinnacle Homecoming Parade, requested date: December 4, 2026
- 9) Notice of Cancellation of Regular Shelby City Council meeting – July 6, 2026 meeting
- 10) Approval of a resolution and order to accept adding Women, Coaches and Officials to the Cleveland County Basketball Wall of Fame Memorial at the Holly Oak Park Gymnasium: Resolution No. 41-2026

END OF CONSENT AGENDA

F. Unfinished Business:

- 1) Adoption of a budget ordinance amendment for the City of Shelby's Electric Substation 11 Circuit 11-2 Project: Ordinance No. 30-2026

Presenting: Ben Yarboro, Assistant City Manager:

- Circuit 11-2 serves Shell Building # 4 on Randolph Road which was purchased by PPG Aerospace Coatings
- Substation 11 is located across from the City of Shelby Water Plant on Grover Street
- To serve the new PPG facility a new line needs to be built from Substation 11 to the PPG site which is approximately 2.5 miles

- In the Fall of 2025, a budget ordinance was adopted to purchase substation equipment which included breakers and regulators
- Now that the design of the project has been completed, materials need to be ordered relating to the construction of the electric line from the substation to the PPG site
- The goal is to purchase the materials in the next month
- Bid documents are ready to be sent out
- Construction will depend on the lead times on materials so it's important to order the materials soon
- PPG needs the electric load to be online by Spring of 2027
- Cost estimate to purchase all the materials is \$700,000
- This is step 2 of 3 in this project. Later this year staff will determine construction and labor costs and come back to Council for that funding

Ms. Arth inquired why PPG is not paying for the new electric line. Mr. Yarboro stated as part of the agreement with PPG the City provides infrastructure to the site that is needed. PPG is providing 3 large transformers and site improvements which would have been a large cost to the City.

ACTION TAKEN: Upon a motion from Mr. White, City Council voted unanimously to approve Ordinance No. 30-2026 entitled, "A BUDGET ORDINANCE AMENDMENT FOR THE CITY OF SHELBY'S ELECTRIC SUBSTATION 11 CIRCUIT 11-2 PROJECT."

2) South Lafayette Street Waterline Replacement Project:

- a) Adoption of a budget ordinance amendment for the City of Shelby's Hickory Creek Sewer Outfall Replacement Project: Ordinance No. 31-2026
- b) Adoption of a budget ordinance amendment for the City of Shelby's S. Lafayette Street Waterline Replacement Project: Ordinance No. 32-2026
- c) Approval of a resolution rejecting all bids received for the South Lafayette Street Waterline Replacement Project: Resolution No. 40-2026

Presenting: Ben Yarboro, Assistant City Manager:

- This project replaces 2600 feet of 6" waterline from the early 1900's

- The waterline would run from Broad Street down to Morton Street and an additional 550 feet between Broad Street and S. Morgan Street that conflicts with the Rail Trail.
- A Project Budget Ordinance was established in December 2025 for the design of this project and to cover some of the construction costs.
- In January 2026 Stantec was selected for design services.
- The bid opening occurred on June 4th, 2026.
- Upon reviewing the bids, it was determined that specific wording that is tied to the funding was not included. Part of the contract that was advertised was not consistent with the funding source.
- Resolution 40-2026, if approved, will reject all bids, allow re-advertisement through online means and allow the City Manager to execute contracts associated with the project.
- To fund the project, staff recommends closing out the Hickory Creek Sewer Outfall Replacement project, which has been completed, and came in under budget. The funds remaining in this project total \$408,564.15.
- Staff also recommends a Water Fund Balance transfer of \$85,896.48.
- These two funding sources total \$494,460.63 which will be used for the S. Lafayette Street Waterline Replacement Project.
- The City is trying to replace this waterline down S. Lafayette Street before NCDOT resurfaces that road in August 2026.

ACTION TAKEN: Upon a motion from Mr. White, City Council voted unanimously to approve Ordinance No. 31-2026 entitled, "A BUDGET ORDINANCE AMENDMENT FOR THE CITY OF SHELBY'S HICKORY CREEK SEWER OUTFALL REPLACEMENT PROJECT."

ACTION TAKEN: Upon a motion from Mrs. Bullock, City Council voted unanimously to approve Ordinance No. 32-2026 entitled, "A BUDGET ORDINANCE AMENDMENT FOR THE CITY OF SHELBY'S S. LAFAYETTE STREET WATERLINE REPLACEMENT PROJECT."

ACTION TAKEN: Upon a motion from Dr. Webber, City Council voted unanimously to approve Resolution No. 40-2026 entitled, "A RESOLUTION REJECTING ALL BIDS RECEIVED FOR THE SOUTH LAFAYETTE STREET WATERLINE REPLACEMENT PROJECT."

G. New Business:

None

H. City Manager's Report:

- **Regarding Webbley Project – Reconstruction is ongoing and on schedule. Recently on the interior they have been working on mobilization, interior demolition, salvaging interior doors, trim and flooring, removing plaster and securing exterior openings. Next steps are deconstruction of the rear structure, removal of windows, exterior soffits and trim, and continue with the interior work.**
- **Community Meeting with Uptown Shelby Association will be tomorrow at the Shelby Police Department at 9:00 a.m. Uptown business owners and citizens are welcome.**
- **The Community Walkthrough scheduled for tomorrow at 2:30 has been postponed. A new date will be announced when scheduled.**
- **America 250 banners are displayed around Uptown. Thank you to our Public Works and Electric Departments for hanging these banners. The banners were provided by America 250 NC Cleveland County.**
- **Regarding the drought conditions – Still in a severe drought; not much change in water flow since last report. Staff feels like we are in a sustainable period with the recent rains.**

I. Council Announcements and Remarks:

Mayor Anthony mentioned the City offices will be closed on June 19th, for the Juneteenth Holiday.

A tree planting will be held on July 1st at Hanna Park, part of the America 250 events.

On July 3rd the City Park will have the Fireworks Extravaganza.

Ms. Arth asked if staff and Council could look at and possibly revise the City's AI policy. By consensus, Council and staff agreed.

Dr. Webber thanked those that organized the Catawba Nuclear Plant tour. He stated it was very informative and an enjoyable day.

J. Closed Session:

ACTION TAKEN: Mr. White made a motion to enter a closed session pursuant to the appropriate North Carolina General Statutes as cited below. Mayor Anthony invited all Council members present, along with Mr. Lunsford, Mr. Yarboro, Ms. Melton, Mrs. Williams, Chief Fraser, and Mrs. Hart to attend. The

motion passed unanimously, and Council moved into closed session at 6:55 p.m.

- 1) N.C. General Statute 143-318.11(3): To consult with an attorney employed or retained by the public body in order to preserve the attorney-client privilege between the attorney and the public body, regarding Henry, Henry, Griggs v. City of Shelby et. al., File No. 1:26-CV-00163**

ACTION TAKEN: Pursuant to a motion by Mr. White, and the unanimous vote of all members present, Council returned to Open session at approximately 7:43 p.m.

H. Adjournment:

- 1) Motion to adjourn**

ACTION TAKEN: Upon a motion made by Ms. Arth, City Council voted unanimously to adjourn the meeting at 7:44 p.m.

Respectfully submitted,

**Carol Williams
City Clerk**

**O. Stanhope Anthony, III
Mayor**

Minutes of June 15, 2026

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-2

- 2) Approval of a reimbursement resolution with regard to Installment
Financings for FY 2026-2027: Resolution No. 43-2026

Consent Agenda Item: (Beth Beam, Director of Finance)

Summary of Available Information:

- Memorandum dated June 4, 2026, from Beth Beam, Director of Finance to Justin Merritt, City Manager
- FY 2027 Equipment Listing
- Resolution No. 43-2026

City Manager's Recommendation / Comments

Resolution No. 43-2026 is presented for City Council consideration at this time via the Consent Agenda. If approved this resolution allows the City to essentially reimburse itself with borrowed funds after the fact. The City typically will cash flow these capital purchases and then toward the end of the fiscal year close the financing with the bank and then reimburse actual costs. As Council is aware the City annually finances the purchase of all rolling stock equipment and vehicles through the issuance of a 59-month private placement financing agreement. Each year the total approved amount for rolling stock purchase is bid out to qualified financial institutions. This includes rolling stock for all City departments. Later this year the City will solicit and accept financing proposals to fund these purchases. Approval of a financing agreement will then be brought before Council for consideration.

It is my recommendation that Resolution No. 43-2026 be adopted and approved by City Council at this time via the Consent Agenda.



To: Justin Merritt, City Manager

From: Beth B. Beam, Director of Finance

Date: June 4, 2026

Subject: FY27 Reimbursement Resolution

Background:

Each year, the City of Shelby finances its annual rolling stock (departmental service trucks, utility trucks, backhoes, etc...) and equipment by borrowing money for a 59-month term at tax exempt interest rates. This allows the City to maintain its fleet and maintain cash liquidity most efficiently. Requests for Proposals for the financing of capital purchases for FY27 will again be sent out to multiple financial institutions in order to obtain the most competitive rate.

Review:

A reimbursement resolution is needed in order for the City to reimburse itself from the financing proceeds obtained to purchase capital equipment during the FY27 year.

Recommendation:

It is recommended that the City Council adopt the Reimbursement Resolution for FY27.

FY27 Equipment Loan Equipment Listing:

ORG	OBJ	DESCRIPTION	FY27 BUDGET	Items:	Cost per	Fund Total
GENERAL FUND:						
110420	51000	CAPITAL EQUIPMENT	\$217,388.00	Servers, computer equipment, etc...		
110421	54000	CAPITAL OUTLAY VEHICLES	\$45,000.00	Replace 2019 Nissan Frontier (Lucas' truck would become backup and 2011 Ford Ranger would be sold)		
110434	51000	CAPITAL EQUIPMENT	\$140,473.00	Paratech Shore Trench Kit		\$22,799
				(2) Lennox Gas Furnace and 3 Phase Air Conditioner	\$12,750	\$25,500
				FIAR Fire Extinguisher Prop		\$17,474
				Structural PPE Air Gear Dryer		\$12,000
				(3) Traffic Signal EVP	\$20,900	\$62,700
110451	54000	CAPITAL OUTLAY VEHICLES	\$45,000.00	Replace 2013 F-150 with over 120,000 miles - Asst Director vehicle		
110453	51000	CAPITAL EQUIPMENT	\$55,000.00	Replace Generator for Fuel pumps & Airfield Lighting		
110471	51000	CAPITAL EQUIPMENT	\$210,000.00	Loader for air curtain burner		
110491	51000	CAPITAL EQUIPMENT	\$24,000.00	Replace GPS Data Logger #2 & Survey-Grade Receiver		
110613	51000	CAPITAL EQUIPMENT	\$120,500.00	Greens mower - replaces 2003 Jacobsen w/3700 hours		\$66,000
				Scag Cheetah Z-mower - replaces 2017 Scag Turf Tiger w/2000 hours		\$17,000
				Scag V-Ride mower (new) smaller footprint for cemeteries, offsite parks, uptown routes		\$15,500
				Kubota UTV - maintain trail system (new)		\$22,000
110613	54000	CAPITAL OUTLAY VEHICLES	\$92,000.00	(2) 4x2 Crew cab - replaces 2011 Dodge & 2003 Ford F250	\$46,000	\$92,000
						\$949,361
POWELL BILL:						
112452	54000	CAPITAL OUTLAY VEHICLES	\$45,000.00	Replace 2013 F-150 w/160,000 miles		
						\$45,000
WATER:						
610713	51000	CAPITAL EQUIPMENT	\$196,000.00	Replace Mini-Excavator with Bush Hog Attachment		\$120,000
				Portable generator - split between 4 utilities		\$65,000
				Message Board - split 713, 723, 733, 743, 751 (\$55,000 total)		\$11,000
610713	54000	CAPITAL OUTLAY VEHICLES	\$60,000.00	Replace 2014 Dodge 1500 (#602)		
610714	51000	CAPITAL EQUIPMENT	\$49,500.00	Watson Marlow Chemical Metering Pump		\$13,000
				Stream & Current monitor for raw water		\$20,000
				SCADA System spare parts		\$16,500
						\$305,500
SEWER:						
620723	51000	CAPITAL EQUIPMENT	\$136,000.00	Portable generator - split between 4 utilities		\$65,000
				Small & Large spare sewer CCTV Camera/Tractor accessories		\$60,000
				Message Board - split 713, 723, 733, 743, 751 (\$55,000 total)		\$11,000
620723	54000	CAPITAL OUTLAY VEHICLES	\$150,000.00	Replace 2015 Ford F-150 (#652)		\$60,000
				Replace 2023 Ford F-350 Service Truck (#687)		\$90,000
620724	51000	CAPITAL EQUIPMENT	\$63,500.00	Fork Truck for unloading & placing chemicals on scales		\$50,000
				Refrigerated compost sampler		\$13,500
						\$349,500
ELECTRIC:						
630733	51000	CAPITAL EQUIPMENT	\$166,000.00	Replace 2010 Hudson 6-ton trailer (#15) - excavator & wire transport		\$15,000
				Automated Flagger Assistance device		\$45,000
				Portable generator - split between 4 utilities		\$65,000
				Fox Bldg Gate/Opener		\$30,000
				Message Board - split 713, 723, 733, 743, 751 (\$55,000 total)		\$11,000
630733	54000	CAPITAL OUTLAY VEHICLES	\$90,000.00	Replace 2011 Ford F-250 Service Truck (#724)		
						\$256,000
NATURAL GAS:						
640743	51000	CAPITAL EQUIPMENT	\$196,000.00	Replace Ditch Witch RT45 Trencher (#5826)		\$75,000
				Replace 2000's Pipeline current mapper		\$20,000
				Replace GPS Data Logger #2 & Survey-Grade Receiver		\$25,000
				Portable generator - split between 4 utilities		\$65,000
				Message Board - split 713, 723, 733, 743, 751 (\$55,000 total)		\$11,000
						\$196,000
STORMWATER:						
650751	51000	CAPITAL EQUIPMENT	\$11,000.00	Message Board - split 713, 723, 733, 743, 751 (\$55,000 total)		\$11,000
						\$11,000
						<u>\$2,112,361.00</u>

RESOLUTION NO. 43-2026

CITY OF SHELBY
A REIMBURSEMENT RESOLUTION WITH REGARD TO
INSTALLMENT FINANCINGS FOR FY 2026-2027

WHEREAS, the Internal Revenue Service and U.S. Treasury Department have published regulations that govern when a political subdivision such as the City of Shelby, North Carolina (the City), can issue or execute tax-exempt obligations to reimburse itself or any agency or division thereof for expenditures on purchases prior to the issuance of tax-exempt obligations for such projects; and

WHEREAS, the regulations require that the governing body of the political subdivision adopt a resolution reciting certain facts and intentions prior to the incurrence of the expenditures; and

WHEREAS, the City anticipates incurring certain expenditures for fiscal year 2026-2027 in an approximate amount not exceeding \$2,112,361 (the “Expenditures”) with respect to purchase of motorized and other equipment prior to the issuance by the City of tax-exempt obligations in the form of an installment purchase contract for such purpose in an amount not to exceed \$2,112,361 expenditures for fiscal year 2026-2027.

NOW, THEREFORE, BE IT RESOLVED, by the City Council of the City of Shelby as follows:

Section 1. The City Council hereby declares a reasonable “official intent” pursuant to Regulation 1.103-18 to the Internal Revenue Code of 1986, as amended, to reimburse the City from the proceeds of tax exempt obligations in the form of an installment purchase contract of the City executed under the authority of North Carolina General Statute 160A-20, as amended for such Expenditures. Such Expenditures must be incurred not later than two years from the date hereof in order to be eligible for reimbursement from the proceeds of the installment purchase contract or such other date as may be applicable in the regulations. The City anticipates incurring Expenditures in an approximate amount of not exceeding \$2,112,361 for fiscal year 2026-2027.

Section 2. To be eligible for reimbursement of the Expenditures, the installment purchase contract will be executed on or before the later of the date one year after the Expenditure was paid or the date one year after the equipment was placed in service, or such later date as may be applicable in the regulations as amended.

Section 3. The Expenditures are incurred solely to acquire, construct or rehabilitate property having a reasonably expected economic life of at least one year.

Section 4. The source of funds for the General Fund Expenditures will be general funds derived primarily from ad valorem taxes of the City and other City general funds and for the Enterprise Funds Expenditures will be charges for enterprise services.

Resolution No. 43-2026
July 20, 2026
Page 2

Adopted and Approved this the 20th day of July 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-3

- 3) Approval of a resolution to accept an offer to purchase property by upset bid process (417 Clegg St.): Resolution No. 44-2026

Consent Agenda Item: (Nicole Hart, Paralegal)

Summary of Available Information:

- Notice of Bid Award
- Resolution No.35-2026
- GIS Map
- Cleveland County Property Card
- Resolution No. 44-2026

City Manager's Recommendation / Comments

This item is presented for City Council consideration. As background, City staff made a determination that the listed parcel is surplus in nature and has no immediate or long-term public purpose. Resolution No. 35-2026 was adopted by City Council in accordance with NC General Statute 160A-269, authorizing the sale of the described property through the upset bid method. City Staff has followed the statutory steps and has received bids as listed below. The required deposit has been received and the time for upset bid has expired.

If approved, Resolution No. 44-2026 would accept the offer from the listed party and authorize the City Manager to facilitate the sale of the property.

Parcel	Location	Acreage	Amount Offered	Tax Value	Purchaser
17794	Clegg St.	0.138	\$7,500	\$7,425	Sundown Automotive

Under the provisions of the statute City Council can accept or reject any or all these bids at its discretion. Resolution No. 44-2026 has been prepared for your consideration at this time.

It is my recommendation that Resolution No. 44-2026 be adopted and approved by City Council at this time via the Consent Agenda.



Post Office Box 207 · Shelby, NC 28151-0207

June 16, 2026

Sundown Automotive, Inc.
228 Rollingbrook Road
Kings Mountain, NC 28086

Dear Mr. Evans,

As you are aware, the resolution (Res. No. 35-2026) to receive an offer to purchase and advertise the offer to purchase for upset bids for property located at 417 Clegg Street (Parcel# 17794) was approved by City Council on June 1, 2026.

Pursuant to GS 160A-269, the City published a notice of the offer after the appropriate deposit had been submitted to the City Clerk. The notice contained a general description of the property, the amount of the offer and a notice that within 10 days, any person may raise the bid.

We received no other bids, so your bid was the highest. Therefore, I've asked the City Manager to place this item on the agenda for City Council to consider your offer. The City Council meeting will take place on Monday, July 20, 2026 at 6:00 p.m. in the Council Chamber at City Hall.

Please keep in mind that City Council may at any time reject any and all offers. The sale of the property is not subject to any contingencies. If Council approves the sale, the City Attorney will facilitate the real estate closing. You will be responsible for all legal fees and recording fees.

If you have any questions, please contact me at 704-669-2521.

Sincerely,

Nicole Hart
City Paralegal

Cc: Justin Merritt, City Manager
Beth Beam, Finance Director
Jason Lunsford, City Attorney

RESOLUTION NO. 35-2026

**RESOLUTION AUTHORIZING THE SALE OF CITY OF SHELBY OWNED
REAL PROPERTY IDENTIFIED BY PARCEL NUMBER 17794 THROUGH THE
UPSET BID PROCEDURE OF N. C. GENERAL STATUTE § 160A-269**

WHEREAS, the City of Shelby owns real property in the City of Shelby identified by parcel number 17794, located in Deed Book 1767 Page 0467 and further identified by Map S-9 Blk 9 Lot 8; and

WHEREAS, City Council has determined no current or future use of the properties identified by the above parcel number; and

WHEREAS, North Carolina General Statute § 160A-269 permits the City to sell property by upset bid, after receiving an offer for the property; and

WHEREAS, the City of Shelby requests bids start at a minimum of the present tax value, which currently is seven thousand four hundred twenty-five (\$7,425.00) dollars; and

WHEREAS, the City is selling this property as is with no warranty and conveyance will be by quitclaim deed, which will be drafted by the City Attorney; and

WHEREAS, the winning bidder shall pay an administrative fee of one hundred fifty (\$150.00) dollars for the preparation of the deed and the filing fee, which is currently twenty-six (\$26) dollars.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SHELBY, NORTH CAROLINA THAT:

Section 1. The City Council authorizes sale of the property described above through the upset bid procedure of North Carolina General Statute § 160A-269.

Section 2. Persons wishing to make an initial offer shall submit a sealed bid with their offer to the office of the City Clerk accompanied by a deposit in the amount of 5% of the bid.

Section 3. The City Manager is authorized to solicit an initial bid in accordance with the N. C. General Statutes § 160A-269.

Section 4. The terms of the final sale are that:

- The City Council must approve the final high offer before the sale is closed, which it will do within thirty (30) days after the final upset bid period has passed;
- The winning bidder must pay an administrative fee of one hundred fifty (\$150.00) dollars and filing the deed at a current cost of twenty-six (\$26.00) dollars; and
- The buyer must pay all costs and fees with cash at the time of closing.

Section 5. The City reserves the right to withdraw the property from sale at any time before the final high bid is accepted and the right to reject at any time all bids.

This Resolution shall become effective upon its adoption and approval. Adopted and Approved this the 1st day of June 2026.

ATTEST:

Carol Williams
Carol Williams
City Clerk

O. Stanhope Anthony III
Mayor



Details [hide](#)



Identify Adjoining Parcels

Select Features by Buffer

Parcels

Owner: SHELBY CITY OF
GIS Deed Reference: 1767-0467
Calculated Acres: 0.13876566

Parcel No.: 17794
Parcel Address(es):
417 CLEGG ST
Prior Year's Owner: CITY OF SHELBY NC
300 S WASHINGTON ST
SHELBY NC 28151-0207
Map: S 9 Blk: 9 Lot: 8
Deed Book: 1767 Pg: 0467
Current Tax Values:
Building Value:
Land Value: \$7,425
Total Value: \$7,425

Neighborhood Code: 232
PIN: 2536986900

Attributes at point: N: 568905, E: 1239601

Jurisdictional Limits

Name: SHELBY

Shelby Zoning

Zoning District: R6

2020 Census Tracts

Census Tract: 951100
NMTC Eligibility: Eligible

NC House and Senate Districts

Senate: 44th

Cleveland County School Districts

Elementary: ELIZABETH ELEMENTARY
Middle: SHELBY MIDDLE SCHOOL
High: SHELBY HIGH SCHOOL

Flood Zones

GRID: 2536
PANEL: 3710253600J

Voting Precincts

Precinct: Shelby Central
Voting Site: SHELBY CITY PARK

Fire Districts

DISTRICT: City of Shelby

Watersheds

ZONE: NONE

N: 569293, E: 1239609
Lat: 35°17' 14.7", Lng: -81°32' 54.2"

Results

PAGE 1
PROG# AS2006

PIN... S 9 9 8

SHELBY
ASSESSMENT NONE .00 .00 .00
OWNER ID.. 1244176
DISTRICT.. 6 CITY OF SHELBY

300 S WASHINGTON ST
PO BOX 207

NBRHOOD... 232 S MAPS 06
FULLY EXEMPT

SHELBY
DESCRIPTION

EXEMPT.... GE GOVERNMENT EXEMPT
ROUTING#..
CATEGORY.. GROUP 100

SALES HISTORY

DEED BK/PAGE	SALE DATE	SALES INSTRUMENT	DISQUALIFIED	SALE AMOUNT	STAMP AMOUNT	DEED NAME
1767 0467	5/09/2018	DEED	MINERAL OR TIMB			CITY OF SHELBY NORTH CAROLINA
1400 1731	12/31/2003	DEED	MINERAL OR TIMB			HABITAT FOR HUMANITY IN CLEVEL
11K 133	1/01/1966	SALE	QUALIFIED			

LAND SEGMENTS

LND #	ZONE	STRAT CODE	LAND TYPE/CODE	LAND QTY	LAND RATE	DPT%	SHP%	LOC%	SIZ%	OTH%	TOP%	TOT ADJ	CURRENT FMV
1		17	FF F	55.000	150.00	90.00	.00	100.00	.00	.00	.00	90.00	7,425
			DPTH..	113		OTHER	ADJ...	.00	.00		.00		
	TOTAL	ACRES..		.000							TOTAL	LAND FMV..	7,425

TOTAL PARCEL VALUES----	LAND /	OVR	IMPROVEMENTS /	OVR	TOTAL LAND/IMPROVE	2025 VALUE
FMV.....	7,425		0		7,425	7,425
APV.....	7,425		0		7,425	7,425

RESOLUTION NO. 44-2026

**A RESOLUTION TO ACCEPT AN OFFER TO PURCHASE
PROPERTY BY UPSET BID PROCESS**

WHEREAS, the City of Shelby received a bid to purchase property located at 417 Clegg Street (Parcel ID # 17794) from Sundown Automotive, Inc. in the amount of \$7,500.00; and,

WHEREAS, Sundown Automotive, Inc. has paid the required 5% deposit on this offer; and,

WHEREAS, the current tax value of Parcel Number 17794 is \$7,425.00; and,

WHEREAS, the City Council of the City of Shelby adopted Resolution No. 35-2026 to receive an offer to purchase and advertise the offer to purchase for upset bids as defined in North Carolina General Statute 160A-269.

**NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF SHELBY
RESOLVES THAT:**

Section 1. That the City of Shelby will accept the offer from Sundown Automotive, Inc. to purchase the property at 417 Clegg Street with Cleveland County Tax Parcel Number 17794 and authorize the City Manager to facilitate the sale of the property.

Section 2. This Resolution shall become effective upon its adoption and approval.

Adopted and approved this the 20th day of July, 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-4

- 4) Approval of a resolution to accept an offer to purchase property by upset bid process (608 LeGrand St.): Resolution No. 45-2026

Consent Agenda Item: (Nicole Hart, Paralegal)

Summary of Available Information:

- Notice of Bid Award
- Resolution No.36-2026
- GIS Map
- Cleveland County Property Card
- Resolution No. 45-2026

City Manager's Recommendation / Comments

This item is presented for City Council consideration. As background, City staff made a determination that the listed parcel is surplus in nature and has no immediate or long-term public purpose. Resolution No. 36-2026 was adopted by City Council in accordance with NC General Statute 160A-269, authorizing the sale of the described property through the upset bid method. City Staff has followed the statutory steps and has received bids as listed below. The required deposit has been received and the time for upset bid has expired.

If approved, Resolution No. 45-2026 would accept the offer from the listed party and authorize the City Manager to facilitate the sale of the property.

Parcel	Location	Acreage	Amount Offered	Tax Value	Purchaser
18175	LeGrand St.	0.236	\$13,080	\$13,080	Sundown Automotive

Under the provisions of the statute City Council can accept or reject any or all these bids at its discretion. Resolution No. 45-2026 has been prepared for your consideration at this time.

It is my recommendation that Resolution No. 45-2026 be adopted and approved by City Council at this time via the Consent Agenda.



Post Office Box 207 · Shelby, NC 28151-0207

June 16, 2026

Sundown Automotive, Inc.
228 Rollingbrook Road
Kings Mountain, NC 28086

Dear Mr. Evans,

As you are aware, the resolution (Res. No. 36-2026) to receive an offer to purchase and advertise the offer to purchase for upset bids for property located at 608 Legrand Street (Parcel# 18175) was approved by City Council on June 1, 2026.

Pursuant to GS 160A-269, the City published a notice of the offer after the appropriate deposit had been submitted to the City Clerk. The notice contained a general description of the property, the amount of the offer and a notice that within 10 days, any person may raise the bid.

We received no other bids, so your bid was the highest. Therefore, I've asked the City Manager to place this item on the agenda for City Council to consider your offer. The City Council meeting will take place on Monday, July 20, 2026 at 6:00 p.m. in the Council Chamber at City Hall.

Please keep in mind that City Council may at any time reject any and all offers. The sale of the property is not subject to any contingencies. If Council approves the sale, the City Attorney will facilitate the real estate closing. You will be responsible for all legal fees and recording fees.

If you have any questions, please contact me at 704-669-2521.

Sincerely,

Nicole Hart
City Paralegal

Cc: Justin Merritt, City Manager
Beth Beam, Finance Director
Jason Lunsford, City Attorney

RESOLUTION NO. 36-2026

**RESOLUTION AUTHORIZING THE SALE OF CITY OF SHELBY OWNED
REAL PROPERTY IDENTIFIED BY PARCEL NUMBER 18175 THROUGH THE
UPSET BID PROCEDURE OF N. C. GENERAL STATUTE § 160A-269**

WHEREAS, the City of Shelby owns real property in the City of Shelby identified by parcel number 18175, located in Deed Book 1637 Page 0158 and further identified by Map S-10 Blk 8 Lot 3; and

WHEREAS, City Council has determined no current or future use of the properties identified by the above parcel number; and

WHEREAS, North Carolina General Statute § 160A-269 permits the City to sell property by upset bid, after receiving an offer for the property; and

WHEREAS, the City of Shelby requests bids start at a minimum of the present tax value, which currently is thirteen thousand eighty (\$13,080.00) dollars; and

WHEREAS, the City is selling this property as is with no warranty and conveyance will be by quitclaim deed, which will be drafted by the City Attorney; and

WHEREAS, the winning bidder shall pay an administrative fee of one hundred fifty (\$150.00) dollars for the preparation of the deed and the filing fee, which is currently twenty-six (\$26) dollars.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SHELBY, NORTH CAROLINA THAT:

Section 1. The City Council authorizes sale of the property described above through the upset bid procedure of North Carolina General Statute § 160A-269.

Section 2. Persons wishing to make an initial offer shall submit a sealed bid with their offer to the office of the City Clerk accompanied by a deposit in the amount of 5% of the bid.

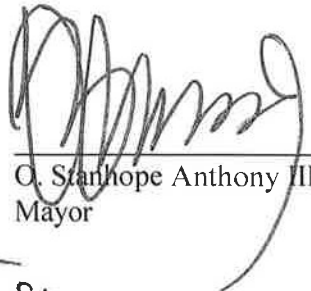
Section 3. The City Manager is authorized to solicit an initial bid in accordance with the N. C. General Statutes § 160A-269.

Section 4. The terms of the final sale are that:

- The City Council must approve the final high offer before the sale is closed, which it will do within thirty (30) days after the final upset bid period has passed;
- The winning bidder must pay an administrative fee of one hundred fifty (\$150.00) dollars and filing the deed at a current cost of twenty-six (\$26.00) dollars; and
- The buyer must pay all costs and fees with cash at the time of closing.

Section 5. The City reserves the right to withdraw the property from sale at any time before the final high bid is accepted and the right to reject at any time all bids.

This Resolution shall become effective upon its adoption and approval. Adopted and Approved this the 1st day of June 2026.



O. Stanhope Anthony III
Mayor

ATTEST:



Carol Williams
City Clerk



Details [hide](#)

[Identify Adjoining Parcels](#)

Select Features by Buffer

Parcels

Owner: SHELBY CITY OF
GIS Deed Reference: 1637-158
Calculated Acres: 0.23650269

Parcel No.: 18175
Parcel Address(es):
608 LEGRAND ST
Prior Year's Owner: CITY OF SHELBY
300 S WASHINGTON ST
SHELBY NC 28151-0207
Map: S10 Blk: 8 Lot: 3
Deed Book: 1637 Pg: 0158
Current Tax Values:
Building Value:
Land Value: \$13,080
Total Value: \$13,080

Neighborhood Code: 232
PIN: 2546073918

Attributes at point: N: 567985, E: 1240314

Jurisdictional Limits

Name: SHELBY

Shelby Zoning

Zoning District: R6

2020 Census Tracts

Census Tract: 951100
NMTC Eligibility: Eligible

NC House and Senate Districts

Senate: 44th

Cleveland County School Districts

Elementary: ELIZABETH ELEMENTARY
Middle: SHELBY MIDDLE SCHOOL
High: SHELBY HIGH SCHOOL

Flood Zones

GRID: 2546
PANEL: 3710254600J

Voting Precincts

Precinct: Shelby Central
Voting Site: SHELBY CITY PARK

Fire Districts

DISTRICT: City of Shelby

Watersheds

ZONE: NONE

N: 567801, E: 1239802
Lat: 35°17' 00.0", Lng: -81°32' 51.5"

Results

DATE 4/08/26
TIME 13:33:16
USER SHERRYL

CLEVELAND COUNTY
PROPERTY CARD
FOR YEAR 2026

PAGE 1
PROG# AS2006

CITY OF SHELBY

PARCEL ID.. 18175
LOCATION... 608 LEGRAND ST
DEED YEAR/BOOK/PAGE.. 2012 1637 0158
PLAT BOOK/PAGE..
LEGAL DESC:#59PB7-10SHELBYCOTTONMILL

PIN... S10 8 3
SHELBY
ASSESSMENT NONE .00 .00 .00
OWNER ID.. 1093489
DISTRICT.. 6 CITY OF SHELBY

300 S WASHINGTON ST
PO BOX 207

SHELBY
DESCRIPTION

TOWNSHIP... 6 SHELBY
NC 28151-0207

NBRHOOD... 232 S MAPS 06
FULLY EXEMPT

MAINTAINED.. 7/18/2025 BY SHERRYL VALUED.. 1/31/2025 BY TBAME
VISITED..... 9/06/2005 BY JP TYPE OF REVIEW
PARCEL STATUS... ACTIVE

EXEMPT.... GE GOVERNMENT EXEMPT
ROUTING#..
CATEGORY.. GROUP 100

SALES HISTORY

DEED BK/PAGE	SALE DATE	SALES INSTRUMENT	DISQUALIFIED	SALE AMOUNT	STAMP AMOUNT	DEED NAME
1637 0158	6/18/2012	SHERIFF DEED	LENDOR,GOVERNME	3,500	7.00	CITY OF SHELBY
1205 0258	8/22/1997	DEED	QUALIFIED	14,000	28.00	S & S PROPERTIES A NC GENERAL
1101 0582	8/01/1991	SALE	QUALIFIED		39.00	
7L 0038	1/01/1991	*INVALID	STAMPS LESS THA			

LAND SEGMENTS

LND #	ZONE	STRAT CODE	LAND TYPE/CODE	LAND QTY	LAND RATE	DPT%	SHP%	LOC%	SIZ%	OTH%	TOP%	TOT ADJ	CURRENT FMV
1		02	FF F	109.000	150.00	80.00	.00	100.00	.00	.00	.00	80.00	13,080
			DPTH..	94				OTHER ADJ...	.00	.00	.00	.00	
TOTAL ACRES..				.000								TOTAL LAND FMV..	13,080

TOTAL PARCEL VALUES----	LAND / OVR	IMPROVEMENTS / OVR	TOTAL LAND/IMPROVE	2025 VALUE
FMV.....	13,080	0	13,080	13,080
APV.....	13,080	0	13,080	13,080

RESOLUTION NO. 45-2026

**A RESOLUTION TO ACCEPT AN OFFER TO PURCHASE
PROPERTY BY UPSET BID PROCESS**

WHEREAS, the City of Shelby received a bid to purchase property located at 608 Legrand Street (Parcel ID # 18175) from Sundown Automotive, Inc. in the amount of \$13,080.00; and,

WHEREAS, Sundown Automotive, Inc. has paid the required 5% deposit on this offer; and,

WHEREAS, the current tax value of Parcel Number 18175 is \$13,080.00; and,

WHEREAS, the City Council of the City of Shelby adopted Resolution No. 36-2026 to receive an offer to purchase and advertise the offer to purchase for upset bids as defined in North Carolina General Statute 160A-269.

**NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF SHELBY
RESOLVES THAT:**

Section 1. That the City of Shelby will accept the offer from Sundown Automotive, Inc. to purchase the property at 608 Legrand Street with Cleveland County Tax Parcel Number 18175 and authorize the City Manager to facilitate the sale of the property.

Section 2. This Resolution shall become effective upon its adoption and approval.

Adopted and approved this the 20th day of July, 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-5

- 5) Approval of a resolution to accept an offer to purchase property by upset bid process (Beam St.): Resolution No. 46-2026

Consent Agenda Item: (Nicole Hart, Paralegal)

Summary of Available Information:

- Notice of Bid Award
- Resolution No.39-2026
- GIS Map
- Cleveland County Property Card
- Resolution No. 46-2026

City Manager's Recommendation / Comments

This item is presented for City Council consideration. As background, City staff made a determination that the listed parcel is surplus in nature and has no immediate or long-term public purpose. Resolution No. 39-2026 was adopted by City Council in accordance with NC General Statute 160A-269, authorizing the sale of the described property through the upset bid method. City Staff has followed the statutory steps and has received bids as listed below. The required deposit has been received and the time for upset bid has expired.

If approved, Resolution No. 46-2026 would accept the offer from the listed party and authorize the City Manager to facilitate the sale of the property.

Parcel	Location	Acreage	Amount Offered	Tax Value	Purchaser
26514	Beam St.	0.787	\$6,000	\$5,954	Christopher Hamrick

Under the provisions of the statute City Council can accept or reject any or all these bids at its discretion. Resolution No. 46-2026 has been prepared for your consideration at this time.

It is my recommendation that Resolution No. 46-2026 be adopted and approved by City Council at this time via the Consent Agenda.



Post Office Box 207 · Shelby, NC 28151-0207

June 30, 2026

Christopher Hamrick
2725 Country Club Circle
Independence, KS 67301

Dear Mr. Hamrick,

As you are aware, the resolution (Res. No. 39-2026) to receive an offer to purchase and advertise the offer to purchase for upset bids for property located at Beam Street (Parcel # 26514) was approved by City Council on June 15, 2026.

Pursuant to GS 160A-269, the City published a notice of the offer after the appropriate deposit had been submitted to the City Clerk. The notice contained a general description of the property, the amount of the offer and a notice that within 10 days, any person may raise the bid.

We received no other bids, so your bid was the highest. Therefore, I've asked the City Manager to place this item on the agenda for City Council to consider your offer. The City Council meeting will take place on Monday, July 20, 2026 at 6:00 p.m. in the Council Chamber at City Hall.

Please keep in mind that City Council may at any time reject any and all offers. The sale of the property is not subject to any contingencies. If Council approves the sale, the City Attorney will facilitate the real estate closing. You will be responsible for all legal fees and recording fees.

If you have any questions, please contact me at 704-669-2521.

Sincerely,

Nicole Hart
City Paralegal

Cc: Justin Merritt, City Manager
Beth Beam, Finance Director
Jason Lunsford, City Attorney

RESOLUTION NO. 39-2026

**RESOLUTION AUTHORIZING THE SALE OF CITY OF SHELBY OWNED
REAL PROPERTY IDENTIFIED BY PARCEL NUMBER 26514 THROUGH THE
UPSET BID PROCEDURE OF N. C. GENERAL STATUTE § 160A-269**

WHEREAS, the City of Shelby owns real property in the City of Shelby identified by parcel number 26514, located in Deed Book 1767 Page 0461 and further identified by Map 6-54 Blk 2 Lot 8; and

WHEREAS, City Council has determined no current or future use of the properties identified by the above parcel number; and

WHEREAS, North Carolina General Statute § 160A-269 permits the City to sell property by upset bid, after receiving an offer for the property; and

WHEREAS, the City of Shelby requests bids start at a minimum of the present tax value, which currently is five thousand nine hundred fifty-four (\$5,954.00) dollars; and

WHEREAS, the City is selling this property as is with no warranty and conveyance will be by quitclaim deed, which will be drafted by the City Attorney; and

WHEREAS, the winning bidder shall pay an administrative fee of one hundred fifty (\$150.00) dollars for the preparation of the deed and the filing fee, which is currently twenty-six (\$26) dollars.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SHELBY, NORTH CAROLINA THAT:

Section 1. The City Council authorizes sale of the property described above through the upset bid procedure of North Carolina General Statute § 160A-269.

Section 2. Persons wishing to make an initial offer shall submit a sealed bid with their offer to the office of the City Clerk accompanied by a deposit in the amount of 5% of the bid.

Section 3. The City Manager is authorized to solicit an initial bid in accordance with the N. C. General Statutes § 160A-269.

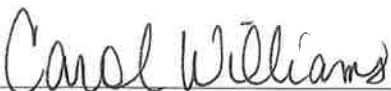
Section 4. The terms of the final sale are that:

- The City Council must approve the final high offer before the sale is closed, which it will do within thirty (30) days after the final upset bid period has passed;
- The winning bidder must pay an administrative fee of one hundred fifty (\$150.00) dollars and filing the deed at a current cost of twenty-six (\$26.00) dollars; and
- The buyer must pay all costs and fees with cash at the time of closing.

Section 5. The City reserves the right to withdraw the property from sale at any time before the final high bid is accepted and the right to reject at any time all bids.

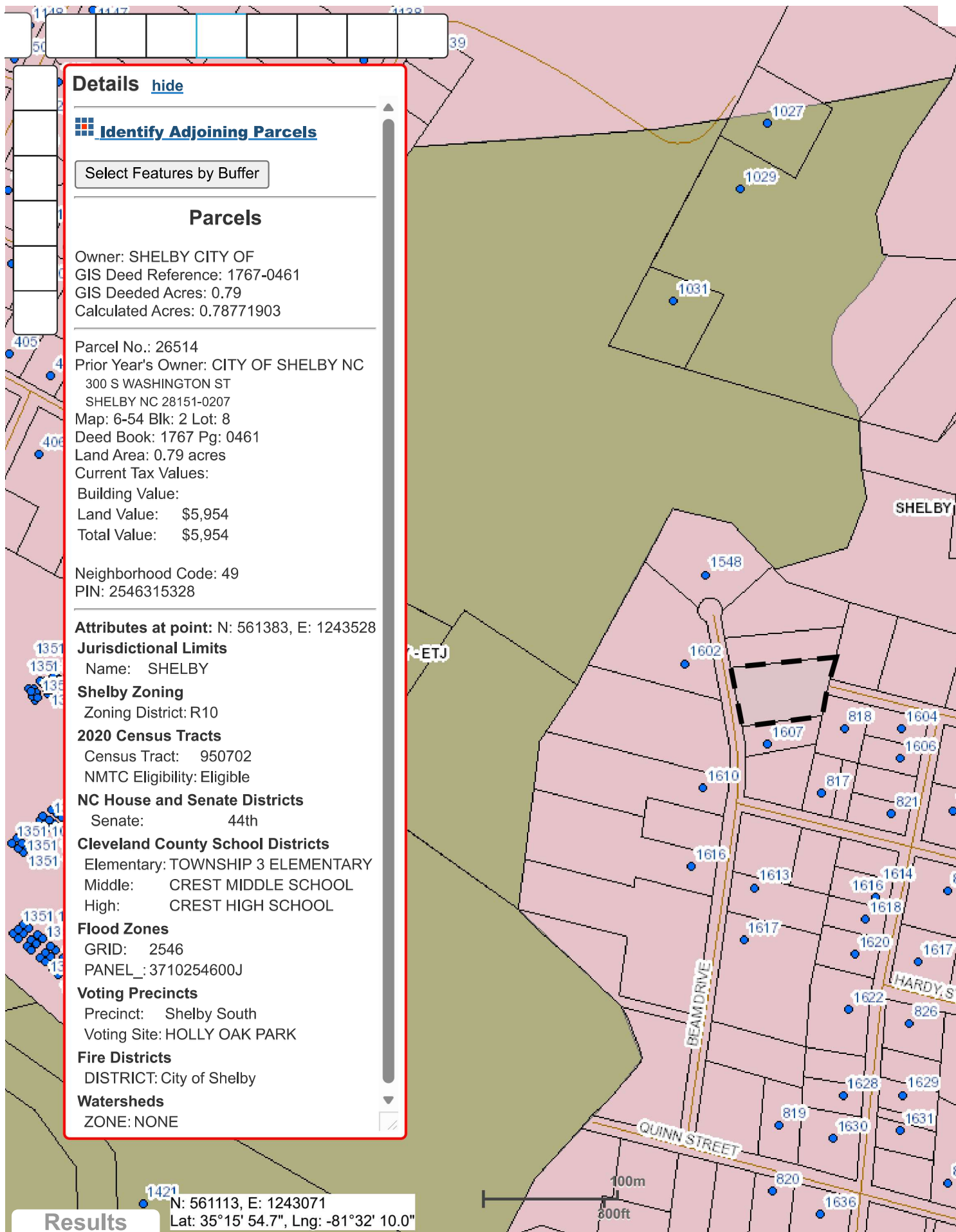
This Resolution shall become effective upon its adoption and approval. Adopted and Approved this the 15th day of June 2026.

ATTEST:


Carol Williams
City Clerk


O. Stanhope Anthony III
Mayor





Details [hide](#)

Identify Adjoining Parcels

Select Features by Buffer

Parcels

Owner: SHELBY CITY OF
GIS Deed Reference: 1767-0461
GIS Deeded Acres: 0.79
Calculated Acres: 0.78771903

Parcel No.: 26514
Prior Year's Owner: CITY OF SHELBY NC
300 S WASHINGTON ST
SHELBY NC 28151-0207
Map: 6-54 Blk: 2 Lot: 8
Deed Book: 1767 Pg: 0461
Land Area: 0.79 acres
Current Tax Values:
Building Value:
Land Value: \$5,954
Total Value: \$5,954

Neighborhood Code: 49
PIN: 2546315328

Attributes at point: N: 561383, E: 1243528

Jurisdictional Limits

Name: SHELBY

Shelby Zoning

Zoning District: R10

2020 Census Tracts

Census Tract: 950702
NMTC Eligibility: Eligible

NC House and Senate Districts

Senate: 44th

Cleveland County School Districts

Elementary: TOWNSHIP 3 ELEMENTARY
Middle: CREST MIDDLE SCHOOL
High: CREST HIGH SCHOOL

Flood Zones

GRID: 2546
PANEL_: 3710254600J

Voting Precincts

Precinct: Shelby South
Voting Site: HOLLY OAK PARK

Fire Districts

DISTRICT: City of Shelby

Watersheds

ZONE: NONE

Results

N: 561113, E: 1243071
Lat: 35°15' 54.7", Lng: -81°32' 10.0"

DATE 5/11/26
TIME 8:08:21
USER SHERRYL

CLEVELAND COUNTY
PROPERTY CARD
FOR YEAR 2026

PAGE 1
PROG# AS2006

CITY OF SHELBY NC
300 S WASHINGTON ST
PO BOX 207

PARCEL ID.. 26514
LOCATION... BEAM ST
DEED YEAR/BOOK/PAGE.. 2018 1767 0461
PLAT BOOK/PAGE.. PB6 98
LEGAL DESC:#73-78 BLK L WASH DEV
PB6-98

PIN... 6-54 2 8
SHELBY
ASSESSMENT NONE .00 .00 .00
OWNER ID.. 1244176
DISTRICT.. 5 CITY OF SHELBY (CO SCH)

TOWNSHIP... 6 SHELBY
NC 28151-0207

SHELBY
DESCRIPTION FULLY EXEMPT

NBRHOOD... 49 6-54 #06

MAINTAINED.. 6/06/2025 BY SHERRYL VALUED.. 1/31/2025 BY TBAME
VISITED..... 3/17/2008 BY JP TYPE OF REVIEW
PARCEL STATUS... ACTIVE

EXEMPT.... GE GOVERNMENT EXEMPT
ROUTING#..
CATEGORY.. GROUP 100

----- SALES HISTORY -----
DEED BK/PAGE SALE DATE SALES INSTRUMENT DISQUALIFIED SALE AMOUNT STAMP AMOUNT DEED NAME

1767	0461	5/09/2018	DEED	MINERAL OR TIMB			CITY OF SHELBY NORTH CAROLINA
1166	1737	9/05/1995	DEED	ADDITION PARCEL	20,000	40.00	HABITAT FOR HUMANITY IN CLEVEL
1166	1735	9/05/1995	DEED	MINERAL OR TIMB			HOSPICE OF CLEVELAND COUNTY IN
0000	1/01/1991	*INVALID		STAMPS LESS THA			

----- LAND SEGMENTS -----
LND # ZONE STRAT CODE LAND TYPE/CODE LAND QTY LAND RATE DPT% SHP% LOC% SIZ% OTH% TOP% TOT ADJ CURRENT FMV

1		17	AC UND	.790	5,000.00	.00	.00	.00	201.00	75.00	.00	150.75	5,954
TOTAL ACRES..				.790								TOTAL LAND FMV..	5,954

TOTAL PARCEL VALUES----	LAND /	OVR	IMPROVEMENTS /	OVR	TOTAL LAND/IMPROVE	2025 VALUE
FMV.....	5,954		0		5,954	5,954
APV.....	5,954		0		5,954	5,954

RESOLUTION NO. 46-2026

**A RESOLUTION TO ACCEPT AN OFFER TO PURCHASE
PROPERTY BY UPSET BID PROCESS**

WHEREAS, the City of Shelby received a bid to purchase property located at Beam Street (Parcel ID # 26514) from Christopher Hamrick, in the amount of \$6,000.00; and,

WHEREAS, Christopher Hamrick has paid the required 5% deposit on this offer; and,

WHEREAS, the current tax value of Parcel Number 26514 is \$5,954; and,

WHEREAS, the City Council of the City of Shelby adopted Resolution No. 39-2026 to receive an offer to purchase and advertise the offer to purchase for upset bids as defined in North Carolina General Statute 160A-269.

**NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF SHELBY
RESOLVES THAT:**

Section 1. That the City of Shelby will accept the offer from Christopher Hamrick, Inc. to purchase the property at Beam Street with Cleveland County Tax Parcel Number 26514 and authorize the City Manager to facilitate the sale of the property.

Section 2. This Resolution shall become effective upon its adoption and approval.

Adopted and approved this the 20th day of July, 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-6

- 6) Approval of a resolution authorizing disbursement of Travel and Tourism funding for Fiscal Year 2026-2027: Resolution No. 47-2026

Consent Agenda Item: (Justin Merritt, City Manager)

Summary of Available Information:

- Resolution No. 47-2026

City Manager's Recommendation / Comments

I have reviewed the applications submitted by the eligible organizations for travel and tourism grant funding. Each year past grant recipients and other organizations that have expressed an interest are eligible to submit grant applications for these funds generated through the 3% room occupancy tax levied by City Council. Each application is reviewed to determine if the proposed use of funds is eligible under the statutes and city policy, the economic impact of the event(s), past use of funds, success of past events, financial participation by the entity, as well as other relevant criteria. Resolution No. 47-2026 is presented for consideration at this time.

As you all know these funds are limited and the competition is significant. I have tried to balance requests for funding within the provisions of adopted City policy to ensure the greatest benefit is realized as set forth within the applicable NC General Statute.

It is my recommendation that Resolution No. 47-2026 be adopted and approved by City Council at this time via the Consent Agenda.

City of Shelby, NC
Travel and Tourism Funding Policy

OBJECTIVE

To establish a general administrative policy for review of outside agency / organization travel and tourism grant requests before funding recommendations are submitted to City Council for approval.

POLICY

The City of Shelby may award grants derived from the levy of the room occupancy tax to agencies and organizations outside of city government (i.e. non-profit organizations) that are located in Shelby. Use of said grants must be in accordance with the provisions of Resolution No. 69-97 adopted by City Council on November 17, 1997 and Senate Bill 585 (SL 1997-361). The Finance Director will review all agency requests and make recommendations to the City Manager. The purpose of the review is to ensure that all relevant financial, budget and management issues of the requesting agency/organization are evaluated before a request is considered for funding. The City Manager will include his recommendations to be presented to City Council.

Excerpt from Senate Bill 585:

Use of tax revenue. The City of Shelby shall use at least two-thirds of the net proceeds of the occupancy tax to promote travel and tourism in the city and shall use the remainder for tourism-related expenditures. The following definitions apply in this subsection:

- (1) Net proceeds. – Gross proceeds less the cost to the city of administering and collecting the tax, as determined by the city, not to exceed three percent (3%) of the first five hundred thousand dollars (\$500,000) of gross proceeds collected each year and one percent (1%) of the remaining gross receipts collected each year.*
- (2) Promote travel and tourism. – To advertise or market an area or activity, publish and distribute pamphlets and other materials, conduct market research, or engage in similar promotional activities that attract tourists or business travelers to the area; the term includes administrative expenses incurred in engaging in these activities.*
- (3) Tourism-related expenditures. – Expenditures that, in the judgment of the city, are designed to increase the use of lodging facilities, meeting facilities, and convention facilities in a city by attracting tourists or business travelers to the city. The term includes tourism-related capital expenditures.*

PROCEDURES

1. The City Manager's office will normally provide notification that the City is accepting grant applications to each agency / organization that received a grant in the current fiscal year and to other agencies / organization requesting an application. The City Manager will determine a set a period of time for receipt of applications. Applications for funding must be received during the annual prescribed period. No applications will be considered otherwise at any other time of year unless so authorized and directed by City Council.

City of Shelby, NC
Travel and Tourism Funding Policy

Procedures continued

2. The Finance Director will review each application and compile information for subsequent review by the City Manager.
3. The City Manager will review grant applications, including information compiled by the Finance Director. The Finance Director will present to the City Manager a preliminary estimate of the total amount of funding requested by outside agencies, a brief financial report on each agency and general funding recommendations using pre-established statutory criteria.
4. The City Manager may hold meetings to review grant applications in more detail and hear formal presentations from specific agencies.
5. The City Manager will complete the review of all grant applications. These recommendations may then be included as part of the City Manager's presentation of the annual budget.
6. Upon adoption of the annual budget ordinance, the City Manager's office will develop memorandum of understanding (MOU) between the City and each outside agency / organization that has been approved for funding. The contract will include the specific use of the appropriated funds, payment arrangements and reporting requirements.
7. The City Manager shall ensure that the City retains in reserves an amount no less than the average of the previous five (5) years receipts in local occupancy tax. These funds are to be used only at the discretion and with the approval of City Council.

City of Shelby, NC
Travel and Tourism Funding Policy

Review Criteria

The Finance Director shall answer the following questions in review of grant applications and make recommendations to the City Manager regarding outside agency / organization funding requests. Each question will be subjectively rated on a scale of 1-10 (ten being the highest) for a total possible score of 100:

What is the funding request as a percent of the total outside agency / organization budget?

How does the proposed activity / project benefit travel and tourism related businesses in Shelby?
And does the activity meet the statutory requirement for use of these funds?

Does the agency demonstrate how they will measure the success of the activity or project for the fiscal year for which they are requesting funding?

Will the activity / project positively impact overnight stays in local accommodations?

Are City funds being requested for general operating costs or for a specific program?

Did the funding request from the City increase, decrease or stay the same from previous requests?
(If an increase, does the agency include a plan on how they will reduce reliance on City funds)?

How does the funding request to the City rank compared to funding requests to other grant and income sources?

Does the application contain all of the required information?

Does the agency have a strong background/capacity to complete the proposed project/activity?

Is the agency financially stable/sound?

City of Shelby, NC
Travel and Tourism Funding Policy

City staff will evaluate applications based on the following guidelines:

The City will only accept funding requests from outside agencies organized as (501) c(3) corporations or economic development agencies and will give strongest consideration to such agencies requesting funds to support the purposes prescribed by the applicable statute.

The City will give strongest consideration to outside agencies that have identified meaningful, achievable, outcome-oriented goals and objectives that support the purpose of the applicable statute.

The City will give a higher priority to outside agencies that request funding for specific programs, services or projects rather than general administrative support.

The City may award outside agency grants for a one-year period starting on July 1 and ending on June 30, consistent with the City's fiscal year. The City will not guarantee funding to any outside agency beyond a one-year time frame. Agencies that are currently receiving funding, or have received funding in the past, must reapply for funding on an annual basis in order to be considered for grants in subsequent fiscal years.

Beginning with fiscal year 2006, applicants will be designated as one of two categories. Applicants assigned to the "start-up" category will receive funding to begin a new agency or program or project. Funding will generally be limited to a maximum of three consecutive years. Other applicants will be assigned to the "on-going" category for established agencies or programs that significantly contribute to purposes of the applicable statute. Funding for these applicants is not guaranteed beyond one year, but may exceed the three-year maximum set for "start-up" applicants.

Outside agency grant applications are typically due in early to mid-February and are reviewed as a part of the annual budget process for the forthcoming fiscal year. The City will not consider any outside agency grant requests submitted outside of the annual budget process or after the established grant application deadline except as otherwise provided herein.

Increases in the total outside agency budget recommended for a given fiscal year may not normally exceed the projected increase in overall occupancy tax receipts for that same fiscal year.

Outside Agency	FY 2022 Grant				FY 2023 Grant				FY 2024 Grant				FY 2025 Grant				FY 2026 Grant				FY 2027 Grant				Policy Matrix		FY 2027 Grant Award
	Award				Award				Award				Award				Award				Requests	Score	Recommendations				
Earl Scruggs Center	\$55,000				\$72,600				\$85,000				\$85,000				\$72,500				\$85,000	93		\$75,000			
Don Gibson Theatre	\$59,800				\$64,800				\$52,300				\$60,000				\$64,800				\$64,800	91		\$64,800			
Cleveland County Travel and Tourism	\$15,000				\$20,000				\$23,500				\$23,500				\$18,500				\$23,000	86		\$18,500			
Sharks Aquatics Club	\$8,900				\$7,500				\$7,000				\$7,000				\$8,500				\$8,500	71		\$4,250			
Uptown Shelby Association	\$11,000				\$32,500				\$16,200				\$21,200				\$13,000				\$22,500	90		\$13,000			
American Legion World Series	\$50,000				\$50,000				\$65,000				\$65,000				\$75,000				\$75,000	92		\$135,450			
Cleveland County Arts Council	\$16,000				\$20,000				\$20,000				\$20,000				\$20,000				\$25,000	62		\$5,000			
Cleveland County Chamber of Commerce	\$0				\$0				\$0				\$20,000				\$20,000				\$20,000	90		\$20,000			
Foothills Players/Shelby Theatre Company	\$0				\$0				\$0				\$0				\$0				\$25,000	64		\$0			
Foothills Farmers Market	\$0				\$0				\$0				\$0				\$0				\$10,000	85		\$2,000			
Cleveland County Music Hall of Fame	\$0				\$0				\$5,000				\$0				\$0				\$10,000	79		\$0			
Merry Go Round Festival	\$0				\$0				\$0				\$0				\$0				\$10,000	87		\$2,000			
Total Award:					\$215,700			\$267,400	\$274,000			\$301,700	\$292,300			\$378,800								\$340,000			

RESOLUTION NO. 47-2026

A RESOLUTION AUTHORIZING DISBURSEMENT OF
TRAVEL AND TOURISM FUNDING FOR FISCAL YEAR 2026-2027

WHEREAS, the City of Shelby through the adoption of the 2005 Strategic Growth Plan recognizes the need to promote economic development efforts throughout the City; and

WHEREAS, City of Shelby currently levies a 3% occupancy tax in accordance with Resolution 69-97 and NC Session Law 1997-361 for the purpose of generating revenue for the promotion of travel and tourism within the City; and

WHEREAS, said occupancy tax proceeds are restricted for use by the noted resolution and session law for travel and tourism promotion and tourism related expenditures; and

WHEREAS, the City Manager has determined that sufficient funding has been appropriated by Council for the fiscal year beginning July 1, 2026; and

WHEREAS, the following organizations have submitted applications and requests to the City Manager and it is his determination that each is eligible under the city policy and the applicable general statute and therefore recommends that the following amounts be awarded:

- | | |
|---|------------|
| 1. Earl Scruggs Center
Marketing and Exhibit / Event Support | \$ 75,000. |
| 2. Don Gibson Theatre
Marketing and Event Support | \$ 64,800. |
| 3. Sharks Aquatics Club
Swim Meet Event Equipment | \$ 4,250. |
| 4. Cleveland County Travel and Tourism
Visitor Marketing, Livermush Festival Marketing | \$ 18,500. |
| 5. Foothills Farmers Market
Marketing, Promotion | \$ 2,000. |
| 6. Uptown Shelby Association
Travel & Tourism Promotion, Printed Marketing | \$ 13,000. |

- | | |
|---|------------|
| 6. American Legion World Series
Marketing, Event Support, Turf Project | \$135,450. |
| 7. Cleveland County Arts Council
Event Marketing | \$ 5,000. |
| 8. Cleveland County Chamber of Commerce
Visitor Center Support/Marketing | \$ 20,000. |
| 9. Merry Go Round Festival
Marketing, Event Support | \$ 2,000. |

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SHELBY, NORTH CAROLINA as follows:

- 1) City Council authorizes disbursement of local occupancy tax funds for the preceding organizations at the discretion of the Finance Director in consultation with the City Manager..
- 2) Authorizes the City Manager to obtain activity reports from each funded organization detailing the use of said funds. The same shall be reported to City Council following the close of the fiscal year ending June 30, 2027.

This Resolution shall become effective upon its adoption and approval.

Adopted and approved this the 20th day of July 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-7

- 7) Approval of a resolution supporting the City of Shelby's Opportunity Zone 2.0 nomination of Census Tract 37045951100: Resolution No. 48-2026

Consent Agenda Item: (Justin Merritt, City Manager)

Summary of Available Information:

- Opportunity Zone 2.0 Overview and map of area
- Resolution No. 48-2026

City Manager's Recommendation / Comments

The resolution being presented to City Council, if adopted, would support the City's nomination of an Opportunity Zone in Census Tract 37045951100, as noted on the attached map. This tract generally encompasses the area west of Lafayette Street to Hwy 226, between Grover Street and Hwy 74. This area has been deemed eligible for designation by the federal government and is conducive for revitalization through City investment in the Carolina Harmony Trail, Depot Park and utility infrastructure.

An Opportunity Zone is a Federal designation, identified through recent census data, which can be nominated by a local government, recommended by the respective State government and, if successful, approved by the federal government. Once designated, this tool provides federal tax incentives to encourage business development, community revitalization and job creation in distressed areas.

It is important to note that this provides federal tax incentives to investors in an Opportunity Zone. There is no local involvement in the incentives, nor is any local match required.

It is my recommendation that Resolution No. 48-2026 be adopted and approved by City Council at this time via the Consent Agenda.

Opportunity Zone 2.0 Overview

Supporting Investment and Growth in North Carolina Communities

The State of North Carolina has begun the process of identifying and submitting to the United States' Treasury a list of census tracts that will eventually be certified as Opportunity Zones (OZ) in North Carolina. We are currently asking for public input and comment on candidate locations that qualify for consideration. **The time window to submit comments and nominations will close at 11:59 p.m. on Sunday, June 21, 2026.**

Planning Map

Only low-income census tracts identified from recent U.S. Census data can be nominated to become a new North Carolina Opportunity Zone. Follow the link button below to explore a map that shows the pool of eligible tracts. Please note we're publishing this map as a courtesy to assist local planning teams.

Feedback and Nomination Form

We're accepting input and nominations using the feedback form you can download.

The form is formatted as a Microsoft Excel document. To provide your input and recommendations:

- Download the Excel file
- Follow the nomination guidelines you'll find below.
- Provide your input directly in the Excel feedback form
- Submit your input via email by sending the completed Excel file as an attachment to OZ-Feedback@commerce.nc.gov.

To ensure your input is received and the process is open, fair, and transparent, all public input and recommendations should only be made through this official feedback form. Commerce will accept recommendations from local governments, economic development organizations, and the general public. Also, we will only accept nomination forms that are submitted by way of the email address above.

Nomination Guidelines

Opportunity Zone 2.0 provides an opportunity to strategically align federal tax incentives with state and local economic development priorities. North Carolina developed three state level guidelines local leaders should consider when evaluating eligible census tracts for their ability to support long-term economic competitiveness and community revitalization.

1. Business Development and Job Creation

- Prioritize census tracts with strong potential to attract or expand businesses in high growth, high wage sectors such as advanced manufacturing, technology, life sciences, clean energy, and other targeted high wage industries.
- Consider tracts containing industrial sites, including mega sites, certified sites, or select sites previously identified and prioritized by Commerce or the Economic Development Partnership of North Carolina (EDPNC).
- Consider tracts with economic development projects underway with additional investment needed when the OZ 2.0 designations are in effect.

2. Strategic Local Revitalization

- Prioritize tracts supported by documented local plans and/or recent investments for community revitalization, industrial site redevelopment, mixed-use projects, or other community-driven initiatives.

3. Pathways to Increased Housing Supply in High Need Areas

- Prioritize tracts where OZ designation can meaningfully expand housing supply, particularly areas near major employment centers or transit corridors, locations with recent public infrastructure investments, identified sites targeted for significant housing development, and areas with documented regional housing needs.

Allocations by County

Preliminary data suggests North Carolina may be able to nominate 202 census tracts for federal designation – a 20 reduction from the current OZ program. In 2018, every North Carolina county contained at least one eligible tract. Under the 2025 Opportunity Zone reauthorization, the low income eligibility threshold was modified, and seven counties no longer contain a qualifying tract: Camden, Currituck, Davie, Gates, Perquimans, Clay, and Yancey.

The 93 counties with at least one eligible tract will be able to nominate at least one census tract. The remaining 109 census tracts will be distributed across the 85 counties with at least two eligible tracts based on their county's population.

Background

The Opportunity Zone (OZ) Program is a federal tax incentive created under the 2017 Tax Cuts and Jobs Act to encourage long-term private investment in economically distressed census tracts. These investments can help strengthen local economies through job creation, business growth, and redevelopment.

Investors may receive federal tax benefits for investing in designated Opportunity Zones, including:

- Deferring capital gains used for an OZ investment
- Reducing capital gains taxes if the investment is held for at least five years
- Eliminating capital gains taxes on profits from the OZ investment if it is held long term

The program was originally set to stop accepting new investments after December 31, 2026, but it was reauthorized and made permanent in 2025 with new tract designations every 10 years.

In 2018, our Department coordinated nomination of the Opportunity Zones currently in use. We are playing a similar role this year and will continue to post up-to-date information on this page.

Beginning on July 1, 2026, state governors will have 90 days to nominate 25% of their state's eligible low-income census tracts for inclusion in the next round

of Opportunity Zones, which will take effect on January 1, 2027 and stay in effect for ten years.

Governor Stein designated the North Carolina Department of Commerce (Commerce) to lead the state's nomination process and advise him on the tracts to submit to the U.S. Treasury for approval and certification.

Walmart
Distribution

951300

950800

950900

256

951300

Pellaville

Shelby City Park
Royster Golf Course

951100

Winston

256

951000

Winston

Moos
Park

Optimist
Park

951200

Plaster
Park

Shelby
Highway

RESOLUTION NO. 48-2026

**A RESOLUTION SUPPORTING THE CITY OF SHELBY'S OPPORTUNITY
ZONE 2.0 NOMINATION OF CENSUS TRACT 37045951100**

WHEREAS, The City of Shelby is committed to promoting economic growth, creating jobs, and encouraging private investment in the community; and

WHEREAS, the Federal Opportunity Zone program provides significant tax incentives to encourage long-term private investment in economically distressed communities; and

WHEREAS, Census Tract 37045951100 has historically faced economic challenges and is well-positioned to benefit from targeted investment in business development, job creation, community revitalization and increased housing supply; and

WHEREAS, a formal Opportunity Zone designation will help our community attract private capital and accelerate local redevelopment plans; and

NOW, THEREFORE, BE IT RESOLVED that the City Council of the City of Shelby, North Carolina strongly supports the nomination of the Census Tract 37045951100 for designation as a Qualified Opportunity Zone.

BE IT FURTHER RESOLVED that this Resolution be entered upon the permanent Minutes of the Shelby City Council.

IN WITNESS WHEREOF, I have hereunto set my hand and caused the Seal of the City of Shelby to be affixed this the 20th day of July 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-8

1) Special Event applications:

- a) Shelby High School Homecoming Parade, requested date: October 9, 2026
- b) Trunk or Treat at the Boardwalk, requested date: October 31, 2026
- c) Small Business Pop-Up Market and Christmas Tree Lighting, requested date: November 28, 2026
- d) Shelby Christmas Parade, requested date: December 6, 2026

Consent Agenda Item: (Carol Williams, City Clerk)

Summary of Available Information:

- Memorandums from Carol Williams, City Clerk to Justin Merritt, City Manager
- Special Event applications

City Manager's Recommendation / Comments

These events are in keeping with special event practices of the City. It is my recommendation that this item be approved by City Council at this time via the Consent Agenda.

Memo

To: Justin Merritt, City Manager

From: Carol Williams, City Clerk

Date: July 10, 2026

Re: Special Event Application

BACKGROUND:

A Special Event Permit Application has been submitted for the following:

- ✓ SHS Homecoming Parade, requested date: October 9, 2026

REVIEW:

All responding City departments have received, reviewed, and approved the referenced application.

RECOMMENDATION:

Please place the attached Special Event Permit Application on the Consent Agenda of July 20, 2026 for Council's review and approval.

ATTACHMENT:

- A. Special Event Permit Application packet received July 2, 2026

criminal in nature, shall be subject to the maximum penalty authorized by G.S. 14-4, as amended.

CITY OF SHELBY SPECIAL EVENT PERMIT APPLICATION

Each question must be legible and answered clearly and completely. Applications must be filed with the City Clerk not less than thirty (30) days before the date on which the event is to take place. A fee of \$20.00 will be due upon submission of the application form.

1. EVENT NAME:

Shelby High School Homecoming
Parade

2. PURPOSE AND BRIEF DESCRIPTION OF EVENT:

2026 Homecoming event for SHS

3. LOCATION OF EVENT (ATTACH MAP):

Parade on Lafayette Begin @ intersection w/ Dorton
End @ intersection w/ Graham

4. PLEASE INDICATE:

Approximately how many people will attend the event? 500

Approximately how many vehicles will be present? 70

Approximately how many animals will be present? 0

If the event is a parade, please indicate the amount of street that will be needed:

Single lane ✓

All lanes in travel direction ✓

Whole street whole street from Doran to Graham
on Lafayette

5. PLEASE LIST THE FOLLOWING PARTY (IES) RESPONSIBLE FOR THE EVENT:

Name: Eli Wortman

Address: 230 East Dixon Blvd Shelby NC 28152

Phones: 704 476 8325 919 744 8526
(Daytime) (Evening)

newortman@clevelandcountyschools.org
E-mail address

Name: _____

Address: _____

Phones: _____
(Daytime) (Evening)

E-mail address

6. PLEASE LIST THE FOLLOWING:

Requested day(s) and date(s) Friday, Oct 9th 2026

Alternate day(s) and date(s) Thursday Oct 8th

Requested hours of operation, from 3:30 AM/PM to 5:00 AM/PM

7. EVENT NOTIFICATION TO RESIDENTS AND BUSINESSES: As an event planner, you are responsible for notifying the neighbors and businesses in the surrounding area of your event. The City requires notifying as many businesses and residents around the event site as possible as early as possible. Please provide your plan of notification at the time you submit your permit application.

8. SANITATION: Please attach your "Plan for Clean-Up." Please check Application Instruction sheet for details.

9. AVAILABILITY OF FOOD, BEVERAGES, AND/OR

ENTERTAINMENT: If there will be music, sound amplification, or any other noise impact, please describe on attached sheet, including the intended hours of the music, sound, or noise.

Will alcoholic beverages be served? no

If yes, attach to the application a copy of your permit from the Cleveland County Alcoholic beverage Control Board. Alcohol may not be served without a permit.

Will food and/or no-alcoholic beverages be served? yes

If yes, attach to the application a copy of your permit from the Cleveland County Department of Health Services.

10. SECURITY AND SAFETY PROCEDURES: Attach to this application a copy of your building permit(s) if you are installing any electrical wiring on a temporary or permanent basis and/or if you are building any temporary or permanent structures such as bleachers, scaffolding, a grandstand, viewing stands, stages, or platforms.

Attach a copy of your Shelby Fire & Rescue Department Permit or permits to this application if you will use parade floats; an open flame; fireworks; or pyrotechnics; vehicle fuel; cooking facilities; enclosures (and tables within those enclosures); tents; air-supported structures; and/or any fabric shelter.

Give name, address, and phone numbers of the agency or agencies, which will provide first aid staff and equipment. Attach additional sheets if necessary.

Name: _____

Address: _____

Phones: _____

Indicate medical services that will be provided for the event.

AMBULANCE: _____

DOCTOR (S): _____

PARAMEDICS: _____

11. CITY SERVICES/EQUIPMENT REQUESTED FOR THIS EVENT:

Block side streets
Police presence

Event Power Request Form and Pricing

To utilize the event panels for power in Uptown Shelby, this form must be submitted with event application and payment made at time of application.

Please use the map below for event panel locations, circle the event panels that you need for your event. If you have questions about the electrical requirements for your event, please contact the Electric Superintendent at 704-669-6649.

Name of Special Event: _____

Authorize Event/Vendor Coordinator: _____

Phone No.: _____ Mobile No.: _____

Email: _____

Event panel (EP) cost is \$15.00 per day per event panel.

Stage panel (STG PAN) cost is \$110.00 per day per stage panel.

Full Day Rentals only

Total Number of Event Panels:

_____ x \$15.00 x Number of Days _____ = \$ _____

Total Number of Stage Panels:

_____ x \$110.00 x Number of Days _____ = \$ _____

All fees must be paid at the time of event application.

Any event panel not requested and paid for in advance and requested the day of the event will be subject to an after-hours charge.

12. ANY ADDITIONAL COMMENTS:

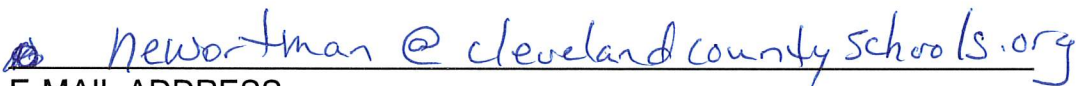
THE CITY OF SHELBY IS NOT A CO-SPONSOR OF THE EVENT

It is understood and agreed that any permit issued pursuant to this application is issued on the condition that the answers herein given are true and correct to the best of the knowledge, information, and belief of the applicant.


SIGNATURE

Nicholas Eli Norton 704 426 8325
APPLICANT PHONE

230 E Dixon Blvd Shelby NC 28152
PHYSICAL ADDRESS


E-MAIL ADDRESS

7-1-26
DATE

Memo

To: Justin Merritt, City Manager

From: Carol Williams, City Clerk

Date: July 10, 2026

Re: Special Event Application

BACKGROUND:

A Special Event Permit Application has been submitted for the following:

- ✓ Trunk or Treat at the Rail Trail Boardwalk, requested date: October 31, 2026

REVIEW:

All responding City departments have received, reviewed, and approved the referenced application.

RECOMMENDATION:

Please place the attached Special Event Permit Application on the Consent Agenda of July 20, 2026 for Council's review and approval.

ATTACHMENT:

- A. Special Event Permit Application packet received June 29, 2026

CITY OF SHELBY SPECIAL EVENT PERMIT APPLICATION

1. EVENT NAME: Halloween Trunk or Treat

Provide treat for children out of car trunks- We have done this for 2 years + is very successful! Bringing folks from all over county to uptown. We will be inviting all uptown stores to participate

morgan St in front of Boardwalk - Hopefully if approved - maybe Block Morgan Street off from W. Warren to Graham But at least in front of Boardwalk Shops.

All lanes in travel direction Both sides of Morgan Lanes

Whole street ✓

5. PLEASE LIST THE FOLLOWING PARTY (IES) RESPONSIBLE FOR THE EVENT:

Name: Terry McCartney
Address: 3316 Crawley Rd Shelby NC 28150
Phones: 704-473-0921 same
(Daytime) (Evening)
SKIP @ Shelby.net
E-mail address

Name: Same
Address: _____
Phones: _____
(Daytime) (Evening)
E-mail address

6. PLEASE LIST THE FOLLOWING:

Requested day(s) and date(s) ~~OCT 30~~ OCT 31, 2026
Alternate day(s) and date(s) _____
Requested hours of operation, from 2:30 AM/PM to 6:30 AM/PM

7. EVENT NOTIFICATION TO RESIDENTS AND BUSINESSES: As an event planner, you are responsible for notifying the neighbors and businesses in the surrounding area of your event. The City requires notifying as many businesses and residents around the event site as possible as early as possible. Please provide your plan of notification at the time you submit your permit application.

8. SANITATION: Please attach your "Plan for Clean-Up." Please check Application Instruction sheet for details.

9. AVAILABILITY OF FOOD, BEVERAGES, AND/OR

ENTERTAINMENT: If there will be music, sound amplification, or any other noise impact, please describe on attached sheet, including the intended hours of the music, sound, or noise.

Will alcoholic beverages be served? NO - Unless Pizza Shop
gets permit + I think Hire

If yes, attach to the application a copy of your permit from the Cleveland County Alcoholic beverage Control Board. Alcohol may not be served without a permit. *has beer & wine*

Will food and/or no-alcoholic beverages be served? _____

If yes, attach to the application a copy of your permit from the Cleveland County Department of Health Services.

10. SECURITY AND SAFETY PROCEDURES: Attach to this application a copy of your building permit(s) if you are installing any electrical wiring on a temporary or permanent basis and/or if you are building any temporary or permanent structures such as bleachers, scaffolding, a grandstand, viewing stands, stages, or platforms.

Attach a copy of your Shelby Fire & Rescue Department Permit or permits to this application if you will use parade floats; an open flame; fireworks; or pyrotechnics; vehicle fuel; cooking facilities; enclosures (and tables within those enclosures); tents; air-supported structures; and/or any fabric shelter.

Give name, address, and phone numbers of the agency or agencies, which will provide first aid staff and equipment. Attach additional sheets if necessary.

Name: _____

Address: _____

Phones: _____

Indicate medical services that will be provided for the event.

AMBULANCE: _____

DOCTOR (S): _____

PARAMEDICS: _____

*BUT
I will
not be
serving
it
@
event
unless
Patrons
get it
@ shops*

11. CITY SERVICES/EQUIPMENT REQUESTED FOR THIS EVENT:

Department that blocks street off
Police usually participates in giving out candy
with their mascot

Event Power Request Form and Pricing

To utilize the event panels for power in Uptown Shelby, this form must be submitted with event application and payment made at time of application.

Please use the map below for event panel locations, circle the event panels that you need for your event. If you have questions about the electrical requirements for your event, please contact the Electric Superintendent at 704-669-6649.

Name of Special Event: _____

Authorize Event/Vendor Coordinator: _____

Phone No.: _____ Mobile No.: _____

Email: _____

Event panel (EP) cost is \$15.00 per day per event panel.

Stage panel (STG PAN) cost is \$110.00 per day per stage panel.

Full Day Rentals only

Total Number of Event Panels:
_____ x \$15.00 x Number of Days _____ = \$ _____

Total Number of Stage Panels:
_____ x \$110.00 x Number of Days _____ = \$ _____

All fees must be paid at the time of event application.

Any event panel not requested and paid for in advance and requested the day of the event will be subject to an after-hours charge.

12. ANY ADDITIONAL COMMENTS:

With the Rail Trail being open - not only will it be beneficial for Shop owners of the uptown area - it will also bring folks here from whole county to be aware of our beautiful new trail -

* I plan on as, I do every year, taking signage to all elementary schools in Cleveland County - Its a win-win for uptown store owners + Rail Trail + City
THE CITY OF SHELBY IS NOT A CO-SPONSOR OF THE EVENT Of Shelby

It is understood and agreed that any permit issued pursuant to this application is issued on the condition that the answers herein given are true and correct to the best of the knowledge, information, and belief of the applicant.


SIGNATURE

Terry T. McCartney - owner of Rail Trail Boardwalk
APPLICANT PHONE 704-473-0921

203 W. Warren St. Shelby NC 28150
PHYSICAL ADDRESS

SKIP@Shelby.net
E-MAIL ADDRESS

6-26-26
DATE

Memo

To: Justin Merritt, City Manager

From: Carol Williams, City Clerk

Date: July 9, 2026

Re: Special Event Permit Application

BACKGROUND:

A Special Event Permit Application has been submitted for the following:

- ✓ Small Business Saturday Pop-Up Market and Tree Lighting, requested date: Saturday, November 28th,

REVIEW:

All responding City departments have received, reviewed, and approved the referenced application.

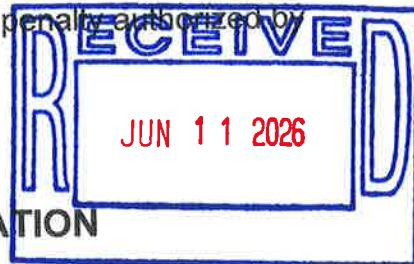
RECOMMENDATION:

Please place the attached Special Event Permit Application on the Consent Agenda of July 20, 2026 for Council's review and approval.

ATTACHMENT:

- A. Special Event Permit Application packet received June 11, 2026

criminal in nature, shall be subject to the maximum penalty authorized by G.S. 14-4, as amended.



**CITY OF SHELBY
SPECIAL EVENT PERMIT APPLICATION**

Each question must be legible and answered clearly and completely. Applications must be filed with the City Clerk not less than thirty (30) days before the date on which the event is to take place. A fee of \$20.00 will be due upon submission of the application form.

1. EVENT NAME:

Small Business Saturday Pop-up Market
& Tree Lighting

2. PURPOSE AND BRIEF DESCRIPTION OF EVENT:

To encourage locals to shop small @ our pop up
market & the annual Christmas Tree Lighting

3. LOCATION OF EVENT (ATTACH MAP):

4. PLEASE INDICATE:

Approximately how many people will attend the event? 800 - 1200

Approximately how many vehicles will be present? 20 or so (vendors on
SWashington)

Approximately how many animals will be present? 2-5

If the event is a parade, please indicate the amount of street that will be needed:

Single lane _____

All lanes in travel direction _____

Whole street _____

5. PLEASE LIST THE FOLLOWING PARTY (IES) RESPONSIBLE FOR THE EVENT:

Name: Taylor Oxtoby

Address: 211 S. Trade St Shelby NC 28150

Phones: (704) 473-8024 " "
(Daytime) (Evening)

toxtoby@uptownshelby.com
E-mail address

Name: Carly Bostic

Address: 211 S. Trade St Shelby NC

Phones: 704-472-0246 704-689-5069
(Daytime) (Evening)

cbostic@uptownshelby.com
E-mail address

6. PLEASE LIST THE FOLLOWING:

Requested day(s) and date(s) Nov 28th 2026

Alternate day(s) and date(s) X

Requested hours of operation, from 10 AM/PM to 10 AM/PM

7. EVENT NOTIFICATION TO RESIDENTS AND BUSINESSES: As an event planner, you are responsible for notifying the neighbors and businesses in the surrounding area of your event. The City requires notifying as many businesses and residents around the event site as possible as early as possible. Please provide your plan of notification at the time you submit your permit application.

8. SANITATION: Please attach your "Plan for Clean-Up." Please check Application Instruction sheet for details.

9. AVAILABILITY OF FOOD, BEVERAGES, AND/OR

ENTERTAINMENT: If there will be music, sound amplification, or any other noise impact, please describe on attached sheet, including the intended hours of the music, sound, or noise.

Will alcoholic beverages be served? No

If yes, attach to the application a copy of your permit from the Cleveland County Alcoholic beverage Control Board. Alcohol may not be served without a permit.

Will food and/or no-alcoholic beverages be served? Yes

If yes, attach to the application a copy of your permit from the Cleveland County Department of Health Services.

10. SECURITY AND SAFETY PROCEDURES: Attach to this application a copy of your building permit(s) if you are installing any electrical wiring on a temporary or permanent basis and/or if you are building any temporary or permanent structures such as bleachers, scaffolding, a grandstand, viewing stands, stages, or platforms.

Attach a copy of your Shelby Fire & Rescue Department Permit or permits to this application if you will use parade floats; an open flame; fireworks; or pyrotechnics; vehicle fuel; cooking facilities; enclosures (and tables within those enclosures); tents; air-supported structures; and/or any fabric shelter.

Give name, address, and phone numbers of the agency or agencies, which will provide first aid staff and equipment. Attach additional sheets if necessary.

Name: _____

Address: _____

Phones: _____

Indicate medical services that will be provided for the event.

AMBULANCE: _____

DOCTOR (S): _____

PARAMEDICS: _____

11. CITY SERVICES/EQUIPMENT REQUESTED FOR THIS EVENT:

Police & Public Works

Event Power Request Form and Pricing

To utilize the event panels for power in Uptown Shelby, this form must be submitted with event application and payment made at time of application.

Please use the map below for event panel locations, circle the event panels that you need for your event. If you have questions about the electrical requirements for your event, please contact the Electric Superintendent at 704-669-6649.

Name of Special Event: Shop Small Market / Tree Lighting

Authorize Event/Vendor Coordinator: Taylor Oxtoby

Phone No.: 704-473-8024 Mobile No.: " "

Email: toxtoby@uptownshelby.com

Event panel (EP) cost is \$15.00 per day per event panel.

Stage panel (STG PAN) cost is \$110.00 per day per stage panel.

Full Day Rentals only

Total Number of Event Panels:
_____ x \$15.00 x Number of Days _____ = \$ _____

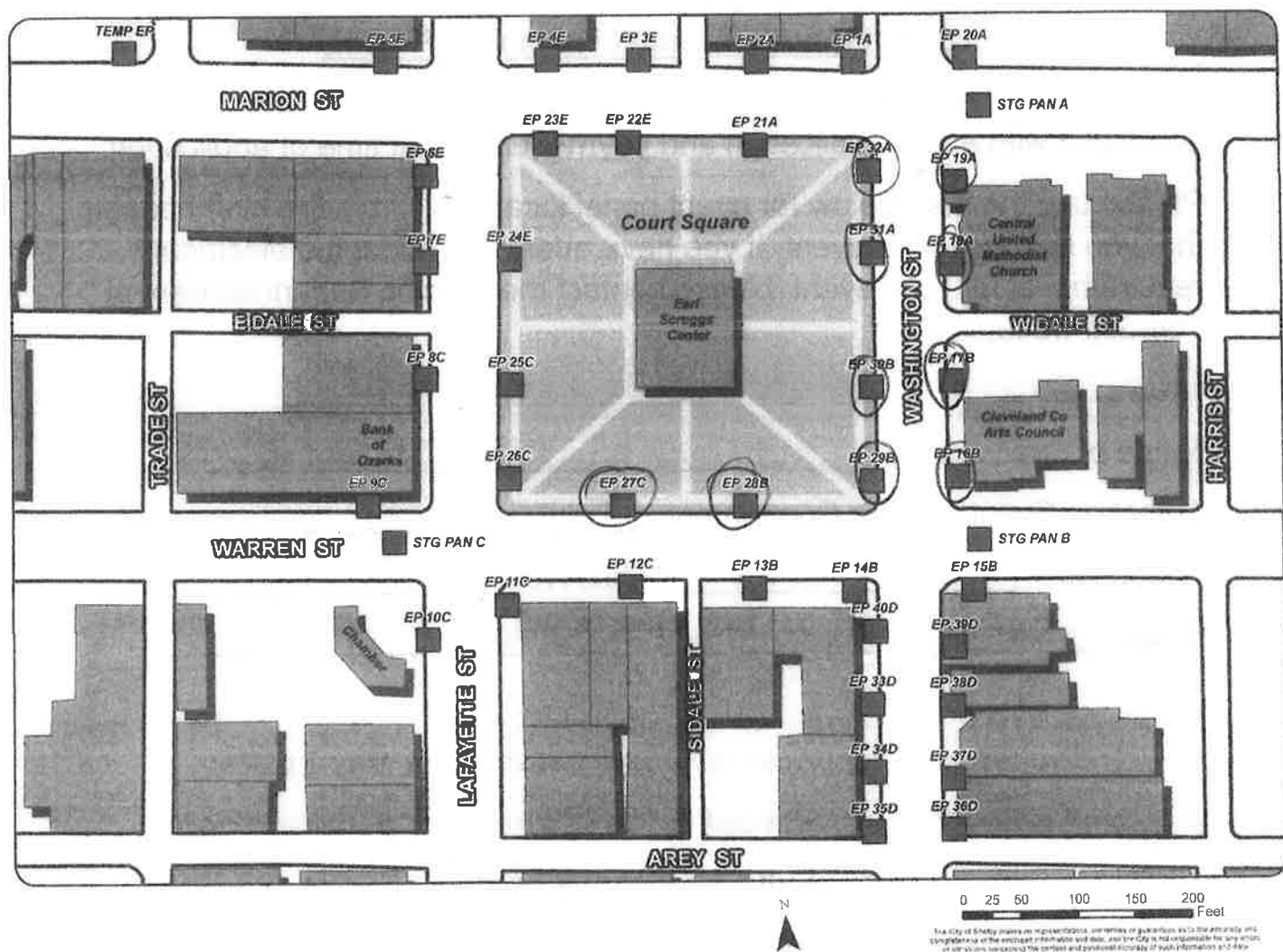
* TBD based
on vendors

Total Number of Stage Panels:
_____ x \$110.00 x Number of Days _____ = \$ _____

All fees must be paid at the time of event application.

Any event panel not requested and paid for in advance and requested the day of the event will be subject to an after-hours charge.

City of Shelby Uptown Event Panels



Legend



Event Panel



Stage Panel

12. ANY ADDITIONAL COMMENTS:

THE CITY OF SHELBY IS NOT A CO-SPONSOR OF THE EVENT

It is understood and agreed that any permit issued pursuant to this application is issued on the condition that the answers herein given are true and correct to the best of the knowledge, information, and belief of the applicant.


SIGNATURE

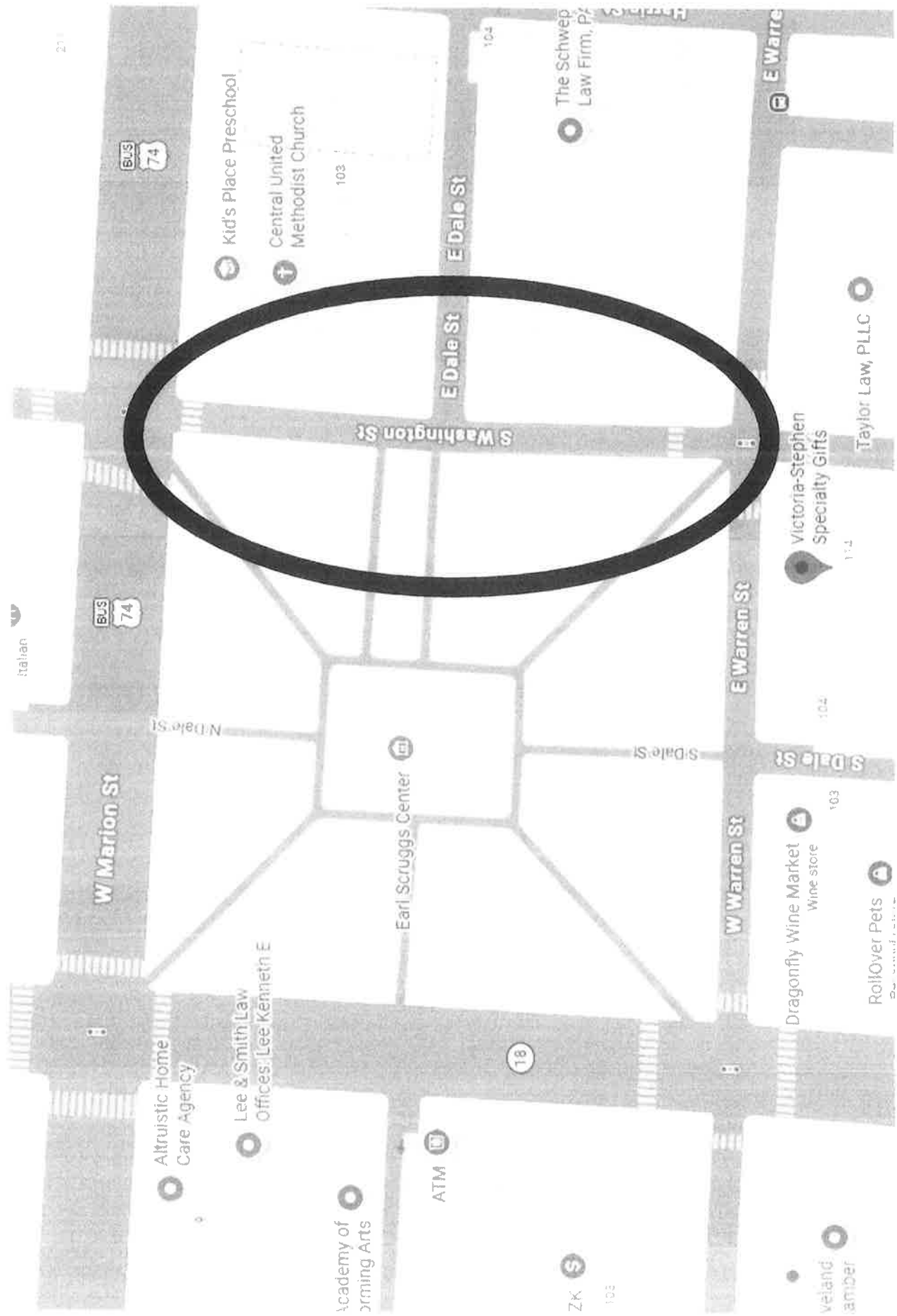
Taylor Oxtoby
APPLICANT

704-473-8026
PHONE

211 S. Trade St. Shelby, NC 28150
PHYSICAL ADDRESS

toxtoby@uptownshelby.com
E-MAIL ADDRESS

6/9/26
DATE



Memo

To: Justin Merritt, City Manager

From: Carol Williams, City Clerk

Date: July 9, 2026

Re: Special Event Permit Application

BACKGROUND:

A Special Event Permit Application has been submitted for the following:

- ✓ Shelby Christmas Parade, requested date: Sunday, December 6, 2026

REVIEW:

All responding City departments have received, reviewed, and approved the referenced application.

RECOMMENDATION:

Please place the attached Special Event Permit Application on the Consent Agenda of July 20, 2026 for Council's review and approval.

ATTACHMENT:

- A. Special Event Permit Application packet received June 11, 2026

criminal in nature, shall be subject to the maximum penalty authorized by G.S. 14-4, as amended.



**CITY OF SHELBY
SPECIAL EVENT PERMIT APPLICATION**

Each question must be legible and answered clearly and completely. Applications must be filed with the City Clerk not less than thirty (30) days before the date on which the event is to take place. A fee of \$20.00 will be due upon submission of the application form.

1. EVENT NAME:

Uptown Shelby Christmas Parade

2. PURPOSE AND BRIEF DESCRIPTION OF EVENT:

3. LOCATION OF EVENT (ATTACH MAP):

4. PLEASE INDICATE:

Approximately how many people will attend the event? 2000 - 4000

Approximately how many vehicles will be present? 80 - 100

Approximately how many animals will be present? 5 - 20

If the event is a parade, please indicate the amount of street that will be needed:

Single lane _____

All lanes in travel direction X yes

Whole street XI yes

5. PLEASE LIST THE FOLLOWING PARTY (IES) RESPONSIBLE FOR THE EVENT:

Name: Carly Bostic

Address: 211 S. Trade St Shelby NC

Phones: 704 689-5069 704-689-5069
(Daytime) (Evening)

cbostic@uptownshelby.com
E-mail address

Name: Taylor Oxtoby

Address: 211 S. Trade St. Shelby NC

Phones: 704-473-8026 704-473-8026
(Daytime) (Evening)

toxtoby@uptownshelby.com
E-mail address

6. PLEASE LIST THE FOLLOWING:

Requested day(s) and date(s) December 16, 2020

Alternate day(s) and date(s) December 13th 2020

Requested hours of operation, from 9 AM/PM to 5 PM/AM

7. EVENT NOTIFICATION TO RESIDENTS AND BUSINESSES: As an event planner, you are responsible for notifying the neighbors and businesses in the surrounding area of your event. The City requires notifying as many businesses and residents around the event site as possible as early as possible. Please provide your plan of notification at the time you submit your permit application.

8. SANITATION: Please attach your "Plan for Clean-Up." Please check Application Instruction sheet for details.

9. AVAILABILITY OF FOOD, BEVERAGES, AND/OR

ENTERTAINMENT: If there will be music, sound amplification, or any other noise impact, please describe on attached sheet, including the intended hours of the music, sound, or noise.

Will alcoholic beverages be served? No

If yes, attach to the application a copy of your permit from the Cleveland County Alcoholic beverage Control Board. Alcohol may not be served without a permit.

Will food and/or no-alcoholic beverages be served? No

If yes, attach to the application a copy of your permit from the Cleveland County Department of Health Services.

10. SECURITY AND SAFETY PROCEDURES: Attach to this application a copy of your building permit(s) if you are installing any electrical wiring on a temporary or permanent basis and/or if you are building any temporary or permanent structures such as bleachers, scaffolding, a grandstand, viewing stands, stages, or platforms.

Attach a copy of your Shelby Fire & Rescue Department Permit or permits to this application if you will use parade floats; an open flame; fireworks; or pyrotechnics; vehicle fuel; cooking facilities; enclosures (and tables within those enclosures); tents; air-supported structures; and/or any fabric shelter.

Give name, address, and phone numbers of the agency or agencies, which will provide first aid staff and equipment. Attach additional sheets if necessary.

Name: _____

Address: _____

Phones: _____

Indicate medical services that will be provided for the event.

AMBULANCE: _____

DOCTOR (S): _____

PARAMEDICS: _____

11. CITY SERVICES/EQUIPMENT REQUESTED FOR THIS EVENT:

Police / Fire / Public Works

Event Power Request Form and Pricing

To utilize the event panels for power in Uptown Shelby, this form must be submitted with event application and payment made at time of application.

Please use the map below for event panel locations, circle the event panels that you need for your event. If you have questions about the electrical requirements for your event, please contact the Electric Superintendent at 704-669-6649.

Name of Special Event: _____

Authorize Event/Vendor Coordinator: _____

Phone No.: _____ Mobile No.: _____

Email: _____

Event panel (EP) cost is \$15.00 per day per event panel.

Stage panel (STG PAN) cost is \$110.00 per day per stage panel.

Full Day Rentals only

Total Number of Event Panels:

_____ x \$15.00 x Number of Days _____ = \$ _____

Total Number of Stage Panels:

_____ x \$110.00 x Number of Days _____ = \$ _____

All fees must be paid at the time of event application.

Any event panel not requested and paid for in advance and requested the day of the event will be subject to an after-hours charge.

12. ANY ADDITIONAL COMMENTS:

THE CITY OF SHELBY IS NOT A CO-SPONSOR OF THE EVENT

It is understood and agreed that any permit issued pursuant to this application is issued on the condition that the answers herein given are true and correct to the best of the knowledge, information, and belief of the applicant.

Carly Bostic
SIGNATURE

Carly Bostic 704-472-0244
APPLICANT PHONE

101 Tall Pine Dr Shelby NC 28150
PHYSICAL ADDRESS

cbostic@uptownshelby.com
E-MAIL ADDRESS

June 9th, 2024
DATE



City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: E-9

1) Management Reports:

a) Financial Summary – May 2026

Consent Agenda Item: (Justin Merritt, City Manager)

Summary of Available Information:

➤ Financial Report for May 2026

City Manager's Recommendation / Comments

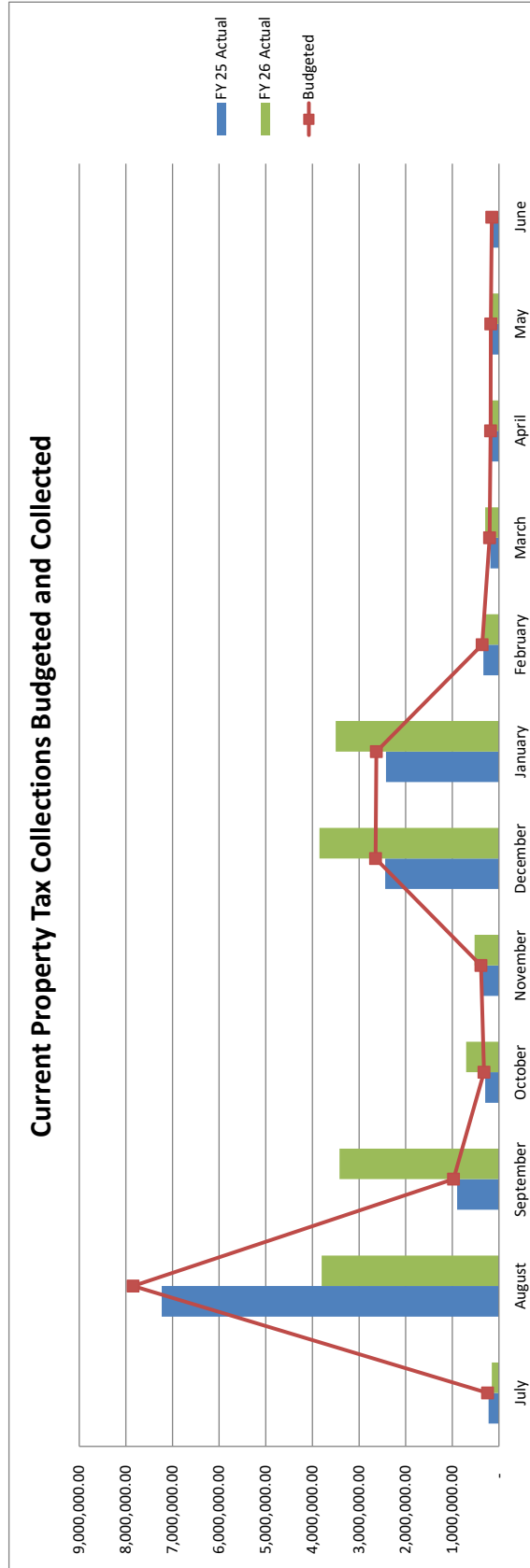
The above listed report is for City Council information and is placed on the agenda to ensure documentation that it was formally presented by management during a regular meeting.



**Monthly Financial Summary
May 2026**

City of Shelby
Current Property Tax Collections
FY 2026
11001000-31001

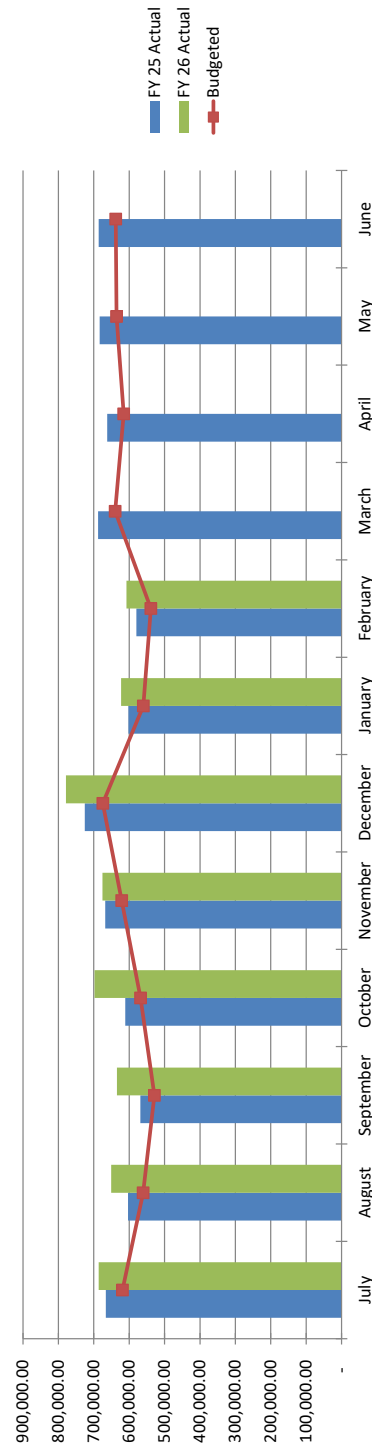
	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Budget	242,321.20	7,844,377.99	973,670.18	318,832.09	383,712.22	2,644,966.98	2,626,745.61	361,330.43	199,019.67	178,213.51	173,829.76	152,980.37	16,100,000.00
FY 2025	223,311.75	7,229,007.66	897,288.38	293,820.57	353,611.03	2,437,476.44	2,420,684.49	332,985.03	183,407.11	164,233.14	160,193.28	140,979.47	14,836,998.35
FY 2026	152,288.11	3,802,653.19	3,421,249.27	702,307.40	522,736.39	3,849,442.56	3,502,297.13	318,121.75	293,639.63	165,190.78	155,506.94		16,885,433.15
% of Budget	0.95%	23.62%	21.25%	4.38%	3.25%	23.91%	21.75%	1.98%	1.82%	1.03%	0.97%	0.00%	104.88%
Variance	(90,033.09)	(4,041,724.80)	2,447,579.09	383,475.31	139,024.17	1,204,475.58	875,551.52	(43,208.66)	94,619.96	(13,022.73)	(18,322.82)	(152,980.37)	785,433.15



City of Shelby
Sales Tax Collections
FY 2026
GL #11001000-32101

	July (Oct)	August (Nov)	September (Dec)	October (Jan)	November (Feb)	December (Mar)	January (Apr)	February (May)	March (June)	April (July)	May (August)	June (September)	Totals
Budget	619,252.11	560,825.89	528,780.78	567,941.02	621,072.38	674,618.19	559,917.99	538,807.06	639,635.64	615,457.12	635,525.75	638,166.08	7,200,000.00
FY 2025	666,057.91	603,215.58	568,748.36	610,868.50	668,015.76	725,608.80	602,239.06	579,532.47	687,982.12	661,976.08	683,561.58	686,401.48	7,744,207.70
FY 2026	686,327.50	650,790.30	634,512.15	698,259.56	675,822.06	778,604.53	623,104.36	607,524.38					5,354,944.84
% of Budget	9.53%	9.04%	8.81%	9.70%	9.39%	10.81%	8.65%	8.44%	0.00%	0.00%	0.00%	0.00%	74.37%
Variance	67,075.39	89,964.41	105,731.37	130,318.54	54,749.68	103,986.34	63,186.37	68,717.32	(639,635.64)	(615,457.12)	(635,525.75)	(638,166.08)	(1,845,055.16)

Sales Tax Collections Budgeted and Collected

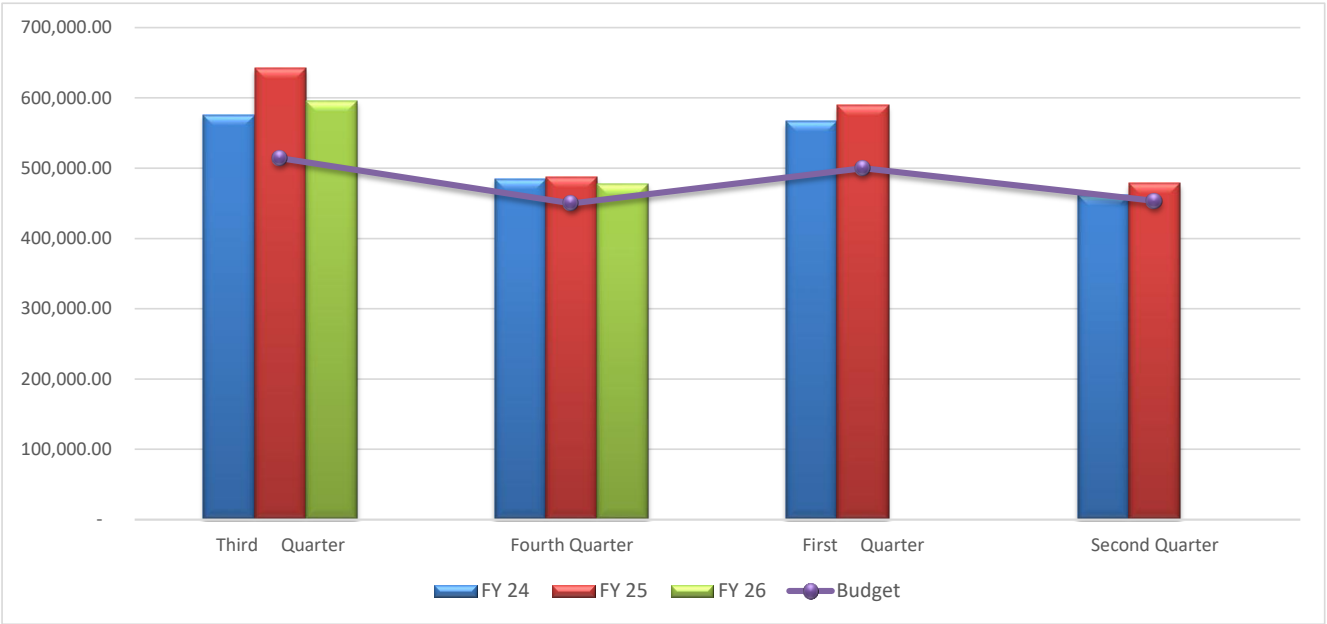


Notes:
Sales Tax Expansion to include Service Contracts: NCGS §105-164.4(a)(11), effective January 2014, has expanded the NC Sales and Use Tax to include "the sales price of a service contract".
A link to the NCDOR directive on this change is embedded here: <http://www.dor.state.nc.us/practitioner/sales/directives/SD-13-5.pdf>

Sales Tax Distribution Method: A link to a description of the individual articles of Sales Tax is embedded here: http://www.dor.state.nc.us/publications/salesdistribution_articles.pdf

City of Shelby
 Utility Sales Tax Distribution (Formerly Utility Franchise Tax)
 Last Three Years
 GL #11001000-33101

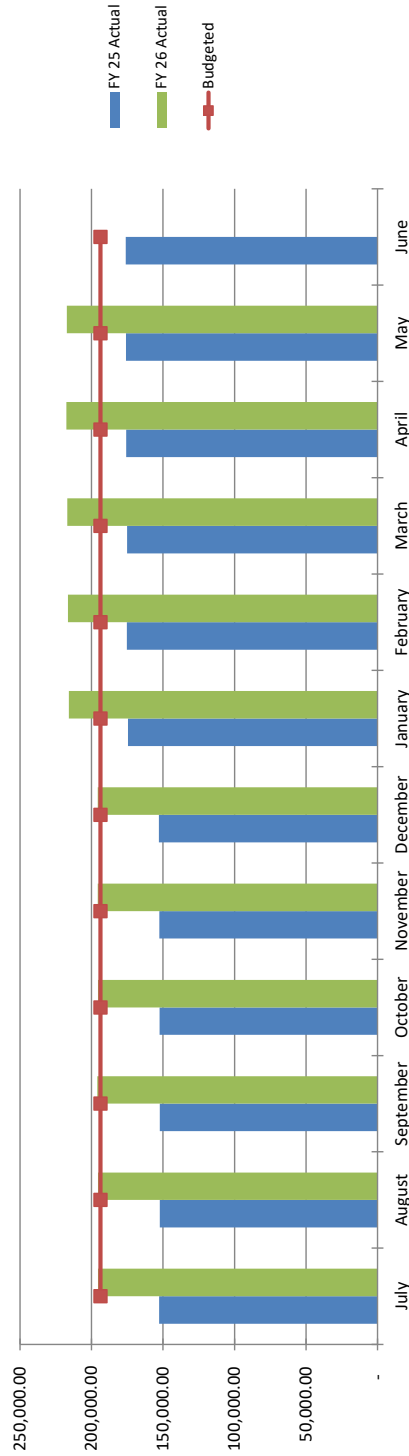
	Third Quarter	Fourth Quarter	First Quarter	Second Quarter	Totals
Collection Period:	(July-Sept.)	(Oct.-Dec.)	(Jan.-Mar.)	(Apr.-June)	
Received in:	December	March	June	September	
FY 24	575,545.63	484,885.74	566,199.32	461,664.29	2,088,294.98
FY 25	642,248.85	487,409.61	588,889.85	478,128.64	2,196,676.95
FY 26	595,464.33	477,178.67			1,072,643.00
Budget	514,196.77	449,892.13	499,995.14	453,354.97	1,917,439.00
% of Budget	31.06%	24.89%	0.00%	0.00%	55.94%



Notes:
 Effective July 2014, utility franchise tax was eliminated on sales of electricity and piped natural gas. A "hold harmless" provision will keep local distribution levels at the amounts received during the 2013-14 Fiscal Year.

	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Budget	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	193,750.00	2,325,000.00
FY 2025	152,721.44	152,242.65	152,213.17	152,415.46	152,523.81	152,835.98	174,434.73	175,218.54	175,205.29	175,837.60	175,989.60	176,035.92	1,967,674.19
FY 2026	195,522.25	195,548.47	195,931.48	195,553.05	195,622.92	195,715.00	215,804.84	216,451.42	217,002.98	217,515.72	217,306.66	217,306.66	2,257,974.79
% of Budget	8.41%	8.41%	8.43%	8.41%	8.41%	8.42%	9.28%	9.31%	9.33%	9.36%	9.35%	0.00%	97.12%
Variance	1,772.25	1,798.47	2,181.48	1,803.05	1,872.92	1,965.00	22,054.84	22,701.42	23,252.98	23,765.72	23,556.66	(193,750.00)	(67,025.21)
Res. Accts:	8,057	8,054	8,078	8,052	8,049	8,059	8,066	8,088	8,121	8,141	8,137		
Comm. Accts:	694	695	689	699	701	698	703	701	697	693	692		

Solid Waste Fees Budgeted and Collected



DEBT SERVICE - GENERAL FUND

General Obligation Bonds

Street & Sidewalk GO Bond '22 (\$6mm) - 2.70%

Principal	400,000.00	400,000.00	400,000.00	400,000.00	400,000.00	400,000.00	400,000.00
2.70% Interest	129,600.00	118,800.00	108,000.00	97,200.00	86,400.00	75,600.00	64,800.00

Debt Retired in 2037

	529,600.00	518,800.00	508,000.00	497,200.00	486,400.00	475,600.00	464,800.00
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Street & Sidewalk GO Bond '25 (\$4mm) - 3.45%

Principal	267,000.00	267,000.00	267,000.00	267,000.00	267,000.00	267,000.00	267,000.00
3.45% Interest	74,750.00	133,394.25	124,182.75	114,971.25	105,759.75	96,548.25	87,336.75

Debt Retired in 2041

	74,750.00	400,394.25	391,182.75	381,971.25	372,759.75	363,548.25	354,336.75
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TOTAL GO BONDS

	604,350.00	919,194.25	899,182.75	879,171.25	859,159.75	839,148.25	819,136.75
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Installment Purchase Contracts

Hanna Park Recreation Complex - 2.83%

2.83% Debt Retired in 2032

	615,024.66	600,497.33	585,970.00	571,442.66	556,915.33	542,388.00	527,860.66
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Electric Loan to GF - Firetruck - 4.75%

4.75% Debt Retired in 15 years

	257,871.10	250,718.48	243,565.85	236,413.22	229,260.59	222,107.96	214,955.33
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FY 21 Installment Purchase

Debt Retired in 2026

	127,738.36	-	-	-	-	-	-
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FY 22 Installment Purchase

Debt Retired in 2027

	313,080.27	313,080.27	-	-	-	-	-
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FY 23 Installment Purchase - Radios

Debt Retired in 2028

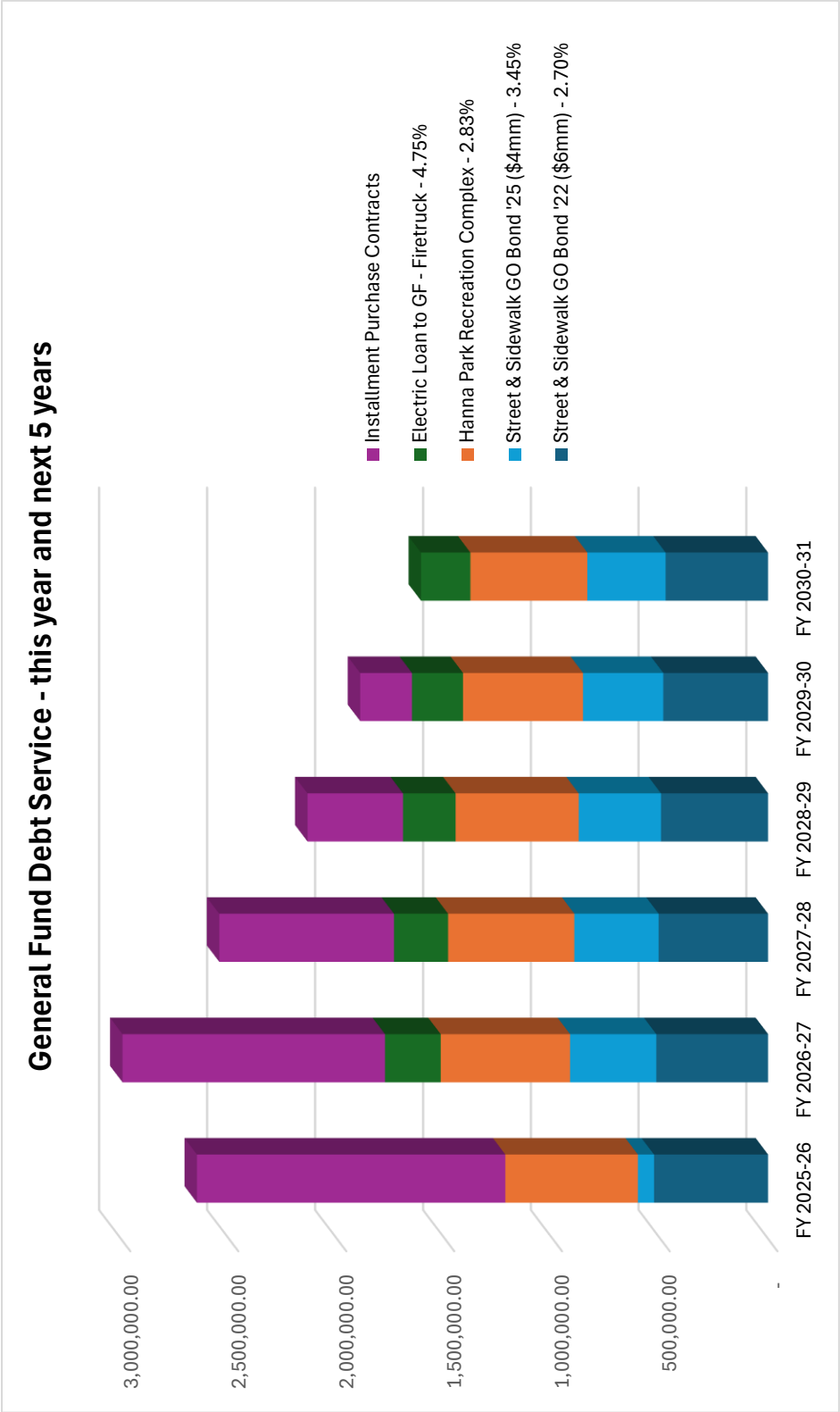
	274,873.35	274,873.35	274,873.35	274,873.35	274,873.35	274,873.35	274,873.35
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FY 23 Installment Purchase

Debt Retired in 2028

	270,763.83	185,002.09	91,725.01	-	-	-	-
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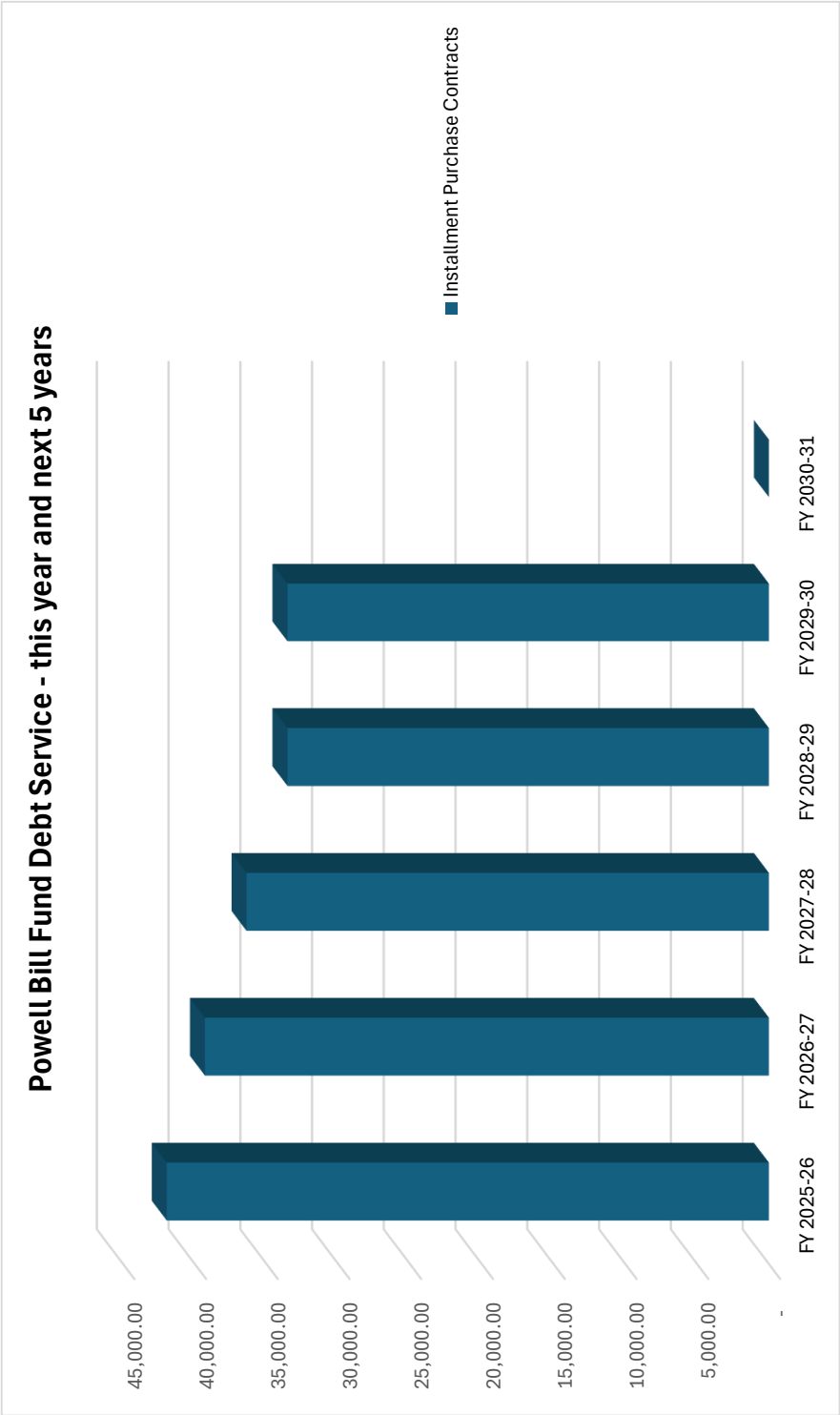
DEBT SERVICE - GENERAL FUND						
FY 24 Installment Purchase						
Debt Retired in 2029						
	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31
	202,319.05	202,319.05	202,319.05	202,319.05		
FY 25 Installment Purchase						
	239,824.82	239,824.82	239,824.83	239,824.82	239,824.83	
Debt Retired in 2030						
subtotal Installment	1,428,599.68	1,215,099.58	808,742.24	442,143.87	239,824.83	
Total Debt Service - General Fund	2,647,974.34	2,992,662.26	2,544,613.46	2,136,323.62	1,892,313.13	1,610,796.84



City of Shelby
YTD Budget Report
For 5/31/2026 (91.67% of Fiscal Year)

ACCOUNT DESCRIPTION	ORIG APPROP	REVISED BUDGET	YTD EXPENDED	ENCUMB	AVAIL BUDGET	% USED
Total 110411 GOVERNING BOARD	107,539	107,539	75,992.91	0.00	31,546	70.70 %
Total 110412 ADMINISTRATION	1,104,304	1,212,304	755,264.68	13,201.70	443,838	63.40 %
Total 110413 FINANCE	979,401	979,401	804,520.77	0.00	174,880	82.10 %
Total 110414 PURCHASING	85,461	85,461	79,796.07	1,405.20	4,260	95.00 %
Total 110416 HUMAN RESOURCES	484,007	484,007	381,514.46	5,362.59	97,130	79.90 %
Total 110419 CUSTOMER SERVICE	28,381	28,381	-71,397.58	13,026.27	86,752	100.00 %
Total 110420 INFORMATION SERVICES	868,372	868,372	643,900.22	77,892.94	146,579	83.10 %
Total 110421 METER SERVICE	3	3	-35,053.99	34,499.71	557	100.00 %
Total 110425 GARAGE	842,940	1,007,078	851,274.98	85.52	155,717	84.50 %
Total 110427 CITY HALL	143,400	143,400	97,203.15	2,741.00	43,456	69.70 %
Total 110428 CITY HALL ANNEX	94,400	94,400	46,118.44	2,075.00	46,207	51.10 %
Total 110431 POLICE	9,752,628	9,832,088	9,259,286.73	100,681.58	472,120	95.20 %
Total 110433 COMMUNICATION	1,007,565	1,009,420	790,917.15	2,539.99	215,963	78.60 %
Total 110434 FIRE	6,260,790	6,387,574	6,231,493.34	15,856.16	140,225	97.80 %
Total 110435 BUILDING INSPECTIONS	619,995	618,143	456,136.79	23,800.00	138,206	77.60 %
Total 110451 STREETS	1,577,625	1,585,425	1,294,054.19	38,983.95	252,387	84.10 %
Total 110453 AIRPORT	749,585	913,585	794,047.44	9,657.68	109,880	88.00 %
Total 110471 SOLID WASTE	2,434,500	2,442,705	2,148,025.01	13,235.50	281,445	88.50 %
Total 110491 GIS	92,876	100,552	47,240.19	7,189.02	46,123	54.10 %
Total 110493 PLANNING SERVICES	943,868	965,013	708,304.91	51,739.07	204,969	78.80 %
Total 110495 SPECIAL APPROPRIATIONS	3,611,500	8,251,210	7,270,337.32	0.00	980,873	88.10 %
Total 110612 PARKS & RECREATION	1,831,665	1,831,665	1,478,212.84	45,577.05	307,875	83.20 %
Total 110613 MAINTENANCE GROUNDS &	1,864,895	1,864,895	1,549,797.35	49,469.89	265,628	85.80 %
Total 110 GENERAL FUND	35,485,700	40,812,622	35,656,987.37	509,019.82	4,646,615	88.60 %

DEBT SERVICE - POWELL BILL FUND		FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31
<u>Installment Purchase Contracts</u>							
FY 23 Installment Purchase							
Debt Retired in 2028		8,412.74	5,748.09	2,849.93			
FY 25 Installment Purchase							
Debt Retired in 2030		33,541.34	33,541.34	33,541.33	33,541.34	33,541.34	
Total Debt Service - Powell Bill Fund		41,954.08	39,289.43	36,391.26	33,541.34	33,541.34	-



City of Shelby
Water Revenue Budget to Actual
FY 2026

FY 2026 Budget

	July	August	September	October	November	December	January	February	March	April	May	June	Total
Inside Water													
Useage	155,504	132,362	127,741	133,188	128,740	122,238	128,933	119,174	117,121	127,375	130,371	139,111	1,561,857
Dollars	582,711.74	525,053.53	513,424.54	523,159.70	514,064.98	490,601.23	506,823.26	482,480.55	477,291.36	503,300.15	513,057.99	537,071.94	6,169,040.97
Outside Water													
Useage	15,047	15,861	14,983	14,447	13,731	11,585	13,104	11,479	11,032	12,931	12,465	13,051	159,717
Dollars	67,078.47	69,616.99	66,986.17	64,677.62	62,428.34	54,860.73	60,588.61	54,439.17	53,000.14	59,295.10	57,855.68	60,132.02	730,959.03
Totals													
Useage	170,551	148,223	142,724	147,636	142,471	133,823	142,036	130,653	128,153	140,306	142,835	152,162	1,721,574
Dollars	649,790.21	594,670.52	580,410.71	587,837.32	576,493.32	545,461.96	567,411.87	536,919.72	530,291.50	562,595.25	570,913.67	597,203.96	6,900,000.00

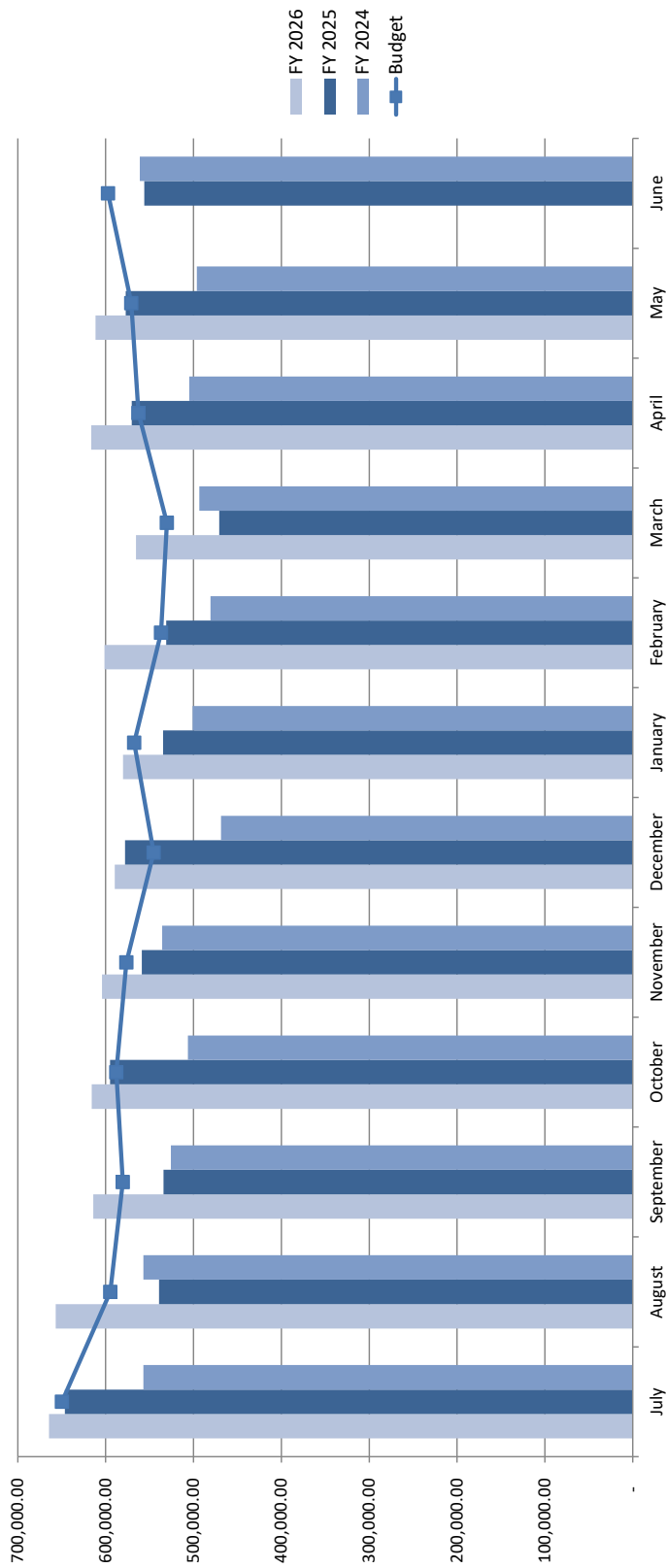
FY 2026 Actual

Inside Water													
Useage	154,108	140,952	125,487	126,181	124,246	123,852	117,545	125,927	112,354	136,100	129,131	-	1,415,883
Dollars	599,890	592,290	542,402	552,164	544,290	537,734	522,872	542,672	508,169	553,854	544,101	-	6,040,437.75
Outside Water													
Useage	14,217	14,466	16,420	14,056	12,973	10,568	12,378	12,862	12,302	13,822	15,407	-	149,471
Dollars	64,527	64,574	71,643	63,792	59,823	51,860	57,408	58,747	57,282	62,629	67,504	-	679,790
Totals													
Useage	168,325	155,418	141,907	140,237	137,219	134,420	129,923	138,789	124,656	149,922	144,538	-	1,565,354
Dollars	664,417	656,865	614,045	615,956	604,113	589,593	580,281	601,419	565,451	616,483	611,606	-	6,720,228.01

Variance

Inside Water													
Useage	(1,396)	8,590	(2,254)	(7,007)	(4,494)	1,614	(11,388)	6,753	(4,767)	8,725	(1,240)	(139,111)	(145,974)
Dollars	17,178.13	67,236.72	28,977.25	29,004.24	30,224.83	47,132.49	16,049.20	60,191.05	30,877.40	50,554.06	31,043.35	(537,071.94)	(128,603.22)
Outside Water													
Useage	(830)	(1,395)	1,437	(391)	(758)	(1,017)	(726)	1,383	1,270	891	2,942	(13,051)	(10,246)
Dollars	(2,551.45)	(5,042.59)	4,656.96	(885.33)	(2,605.34)	(3,001.16)	(3,180.43)	4,308.22	4,282.13	3,333.61	9,648.62	(60,132.02)	(51,169)
Totals													
Useage	(2,226)	7,195	(817)	(7,399)	(5,252)	597	(12,113)	8,136	(3,497)	9,616	1,703	(152,162)	(156,220)
Dollars	14,626.68	62,194.13	33,634.21	28,118.91	27,619.49	44,131.33	12,868.77	64,499.27	35,159.53	53,887.67	40,691.97	(597,203.96)	(179,771.99)

Water Sales In Dollars - Budget to Actual FY 2025-2026



DEBT SERVICE - WATER FUNDRevenue Bonds**Series 2021 Refunding Revenue Bonds**

Principal	470,516.88	474,598.56	484,259.94	490,006.96	187,000.00	90,000.00
Interest	29,097.59	22,504.52	15,822.83	9,024.53	3,220.00	630.00
Debt Retired in 2031	499,614.47	497,103.08	500,082.77	499,031.49	190,220.00	90,630.00

Series 2016 Revenue Bonds-Grover/Morgan - 1.95%

Principal	206,744.67	210,795.85	214,836.41	219,137.91	223,431.93	229,985.76
1.95% Interest	26,655.33	22,604.15	18,473.59	14,262.09	9,968.07	3,368.76
Debt Retired in 2032	233,400.00	233,400.00	233,310.00	233,400.00	233,400.00	233,354.52

NCDEQ-DWI SRF Loan-WTP - 1.53%*Water Treatment Plant*

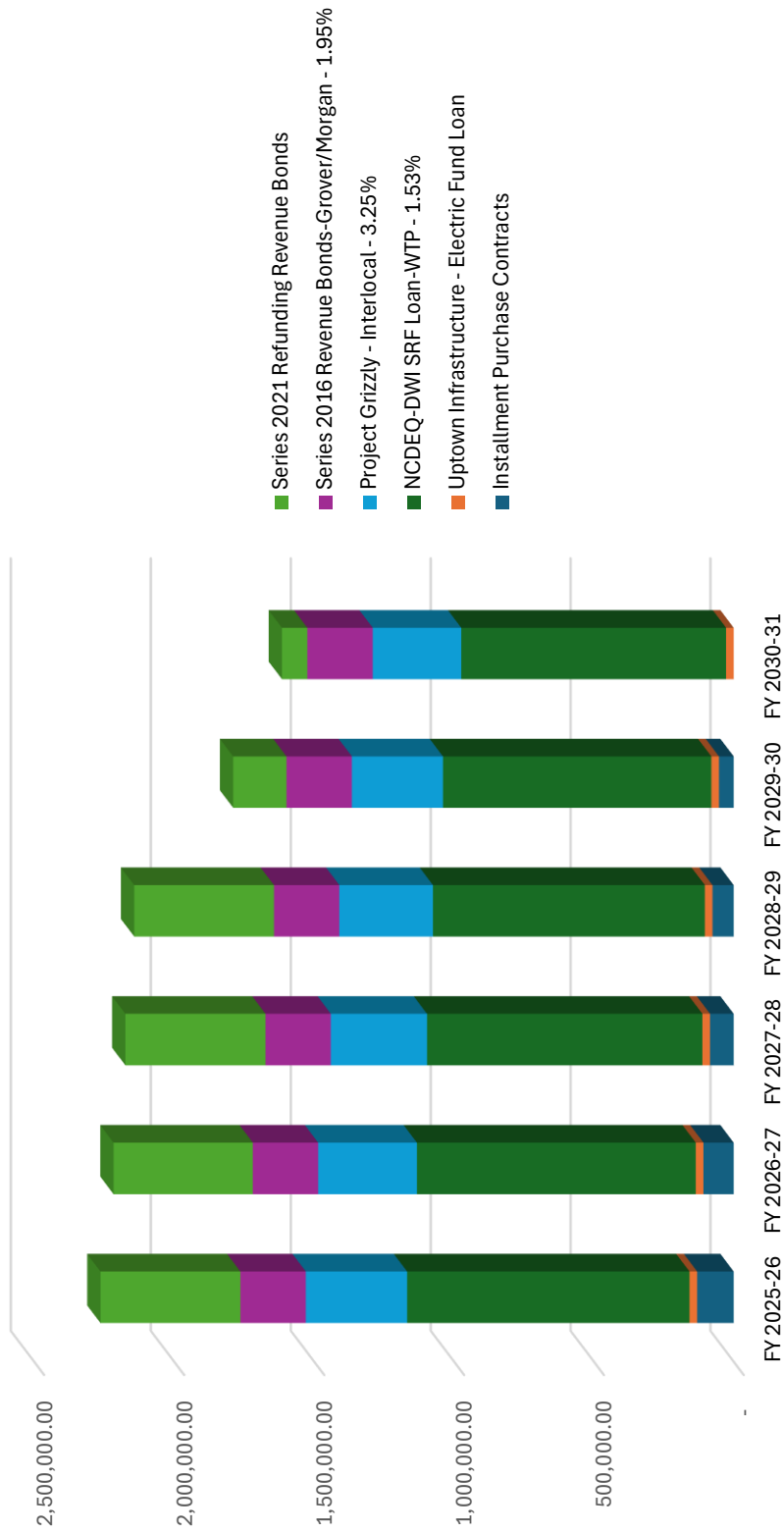
Principal	821,392.50	821,392.50	821,392.50	821,392.50	821,392.50	821,392.50
1.53% Interest	188,509.58	175,942.28	163,374.96	150,807.66	138,240.36	125,673.06
Debt Retired in 2040	1,009,902.08	997,334.78	984,767.46	972,200.16	959,632.86	947,065.56

Project Grizzly - Interlocal - 3.25%

Principal	298,570.05	298,570.05	298,570.05	298,570.05	298,570.05	298,570.05
3.25% Interest	63,396.35	54,339.73	45,283.11	36,226.49	27,169.86	18,113.24
Debt Retired in 2032	361,966.40	352,909.78	343,853.16	334,796.54	325,739.92	316,683.29

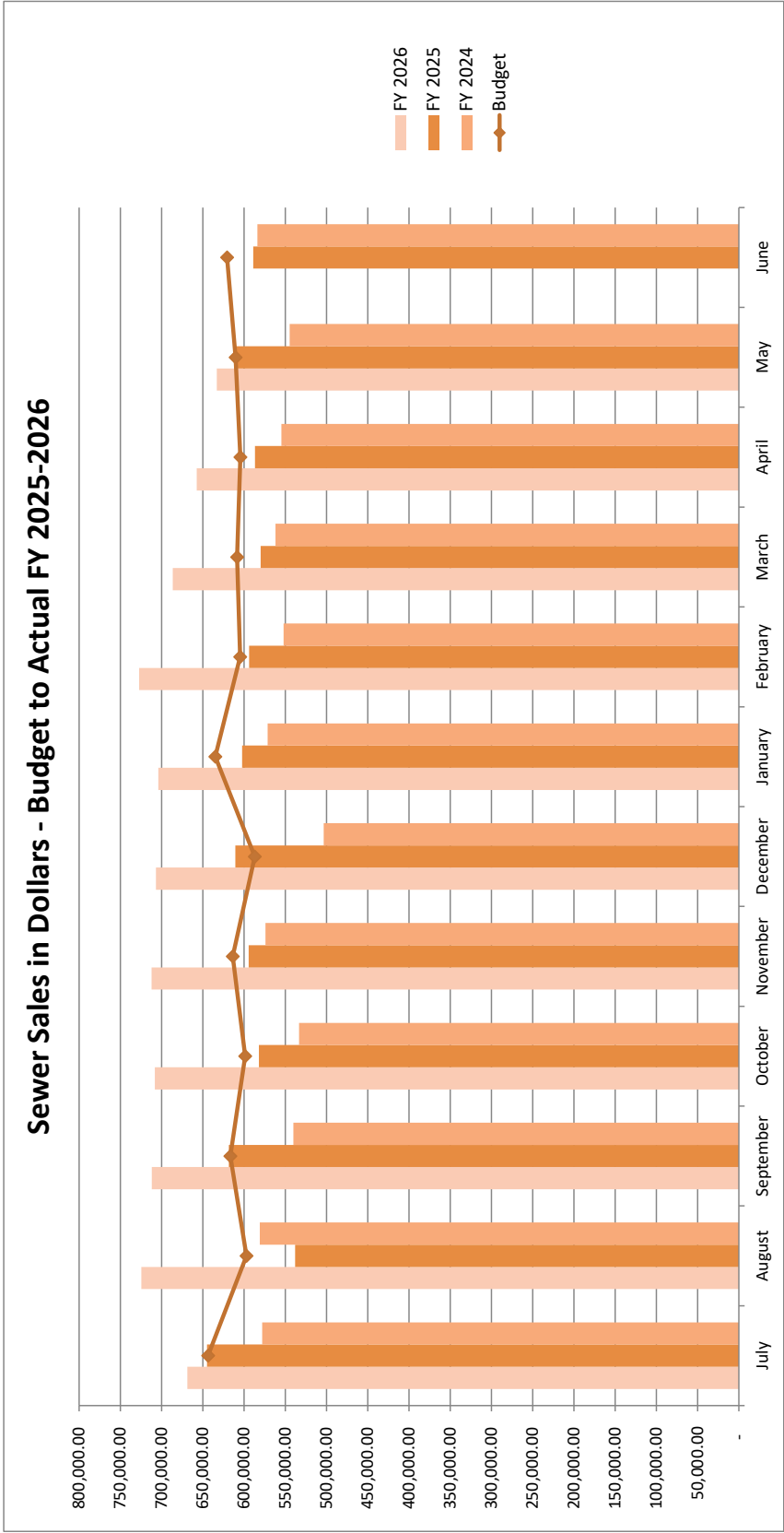
<u>Installment Purchase Contracts</u>									
Uptown Infrastructure - Electric Fund Loan									
Debt Retired in 2038									
		27,250.00	27,250.00	27,250.00	27,250.00	27,250.00	27,250.00	27,250.00	27,250.00
FY 21 Installment Purchase		14,366.13	-	-	-	-	-	-	-
Debt Retired in 2026									
FY 22 Installment Purchase		14,628.58	14,628.58	-	-	-	-	-	-
Debt Retired in 2027									
FY 23 Installment Purchase		25,870.40	17,676.21	8,763.96	-	-	-	-	-
Debt Retired in 2028									
FY 24 Installment Purchase		23,217.59	23,217.59	23,217.59	23,217.59	23,217.59	23,217.59	23,217.59	23,217.59
Debt Retired in 2029									
FY 25 Installment Purchase		52,771.71	52,771.71	52,771.71	52,771.71	52,771.71	52,771.71	52,771.71	52,771.71
Debt Retired in 2030									
Total Installment Debt		130,854.41	108,294.09	84,753.26	75,989.30	52,771.70	52,771.70	52,771.70	-
Total Debt Service - Water Fund		2,262,987.36	2,216,291.73	2,174,016.65	2,142,667.49	1,789,014.48	1,614,983.37	1,614,983.37	1,614,983.37

Water Fund Debt Service - this year and next 5 years



City of Shelby
Sewer Revenue Budget to Actual
FY 2026

	July	August	September	October	November	December	January	February	March	April	May	June	Totals
FY 2026 Budget													
Inside Sewer													
Useage	82,099	71,789	53,846	68,610	73,400	69,082	77,328	71,229	72,561	71,191	73,569	76,205	860,908
Dollars	593,769.71	547,593.00	556,071.45	538,992.61	557,906.50	532,246.83	574,276.02	546,913.59	550,071.44	549,528.04	556,474.30	567,441.85	6,671,285.34
Outside Sewer													
Useage	3,294	3,240	4,574	4,503	4,001	3,914	4,656	4,290	4,339	3,875	3,781	3,682	48,149
Dollars	49,969.93	49,533.19	60,465.20	59,642.87	55,712.89	54,750.36	60,732.92	57,749.24	58,372.02	54,825.27	53,865.61	53,095.14	668,714.66
Totals													
Useage	85,393	75,029	58,420	73,113	77,401	72,996	81,983	75,519	76,900	75,066	77,350	79,887	909,057
Dollars	643,739.64	597,126.19	616,536.65	598,635.48	613,619.39	586,997.20	635,008.93	604,662.83	608,443.46	604,353.32	610,339.91	620,536.99	7,340,000.00
FY 2026 Actual													
Inside Sewer													
Useage	82,171	103,425	93,355	96,127	96,948	99,362	97,353	106,786	93,665	76,364	71,139	-	1,016,695
Dollars	619,030	674,791	649,087	646,556	650,096	650,416	651,805	676,034	633,287	601,923	579,612	-	7,032,635.46
Outside Sewer													
Useage	3,090	3,095	4,719	4,546	2,595	3,880	3,368	3,208	3,461	3,742	3,460	-	39,164
Dollars	49,742	49,740	62,677	61,551	62,120	56,328	52,077	51,303	53,281	55,514	53,539	-	607,874.06
Totals													
Useage	85,261	106,520	98,074	100,673	99,543	103,242	100,721	109,994	97,126	80,106	74,599	-	1,055,859
Dollars	668,772.04	724,530.47	711,764.58	708,107.23	712,216.25	706,743.36	703,882.24	727,336.75	686,568.45	657,437.19	633,150.96	-	7,640,509.52
Variance													
Inside Sewer													
Useage	72	31,636	39,509	27,517	23,548	30,280	20,025	35,557	21,104	5,173	(2,430)	(76,205)	155,787.00
Dollars	25,259.84	127,197.97	93,015.77	107,563.13	92,189.49	118,168.67	77,528.92	129,120.20	83,215.89	52,394.74	23,137.35	(567,441.85)	361,350.12
Outside Sewer													
Useage	(204)	(145)	145	43	(1,406)	(34)	(1,288)	(1,082)	(878)	(133)	(321)	(3,682)	(8,985.33)
Dollars	(227.44)	206.31	2,212.16	1,908.62	6,407.37	1,577.50	(8,655.62)	(6,446.28)	(5,090.90)	689.14	(326.30)	(53,095.14)	(60,840.60)
Totals													
Useage	(132)	31,491	39,654	27,560	22,142	30,246	18,738	34,475	20,226	5,040	(2,751)	(79,887)	146,801.67
Dollars	25,032.40	127,404.28	95,227.93	109,471.75	98,596.86	119,746.16	68,873.31	122,673.92	78,124.99	53,083.87	22,811.05	(620,536.99)	300,509.52



DEBT SERVICE - SEWER FUNDRevenue Bonds**Series 2021 Refunding Revenue Bonds**

Principal	277,664.01	279,862.62	283,510.18	96,815.67		
Interest	12,157.65	8,263.12	4,332.28	1,017.03		
Debt Retired in 2031	289,821.66	288,125.74	287,842.46	97,832.70	-	

NC DENR-DWI SRF Loan-Mall Lift Station - 0%**0% Debt Retired in 2034**

	36,300.10	36,300.10	36,300.10	36,300.10	36,300.10	36,300.10
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NC DENR-DWI SRF Loan-Outfall Project - 0%**0% Debt Retired in 2035**

	156,521.90	156,521.90	156,521.90	156,521.90	156,521.90	156,521.90
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NC DENR-DWI SRF Loan-WWTP Upgrades - 0%**0% Debt Retired in 2036**

	469,832.90	469,832.90	469,832.90	469,832.90	469,832.90	469,832.90
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NC DENR-DWI SRF Loan-Biosolids - 0%**0% Debt Retired in 2041**

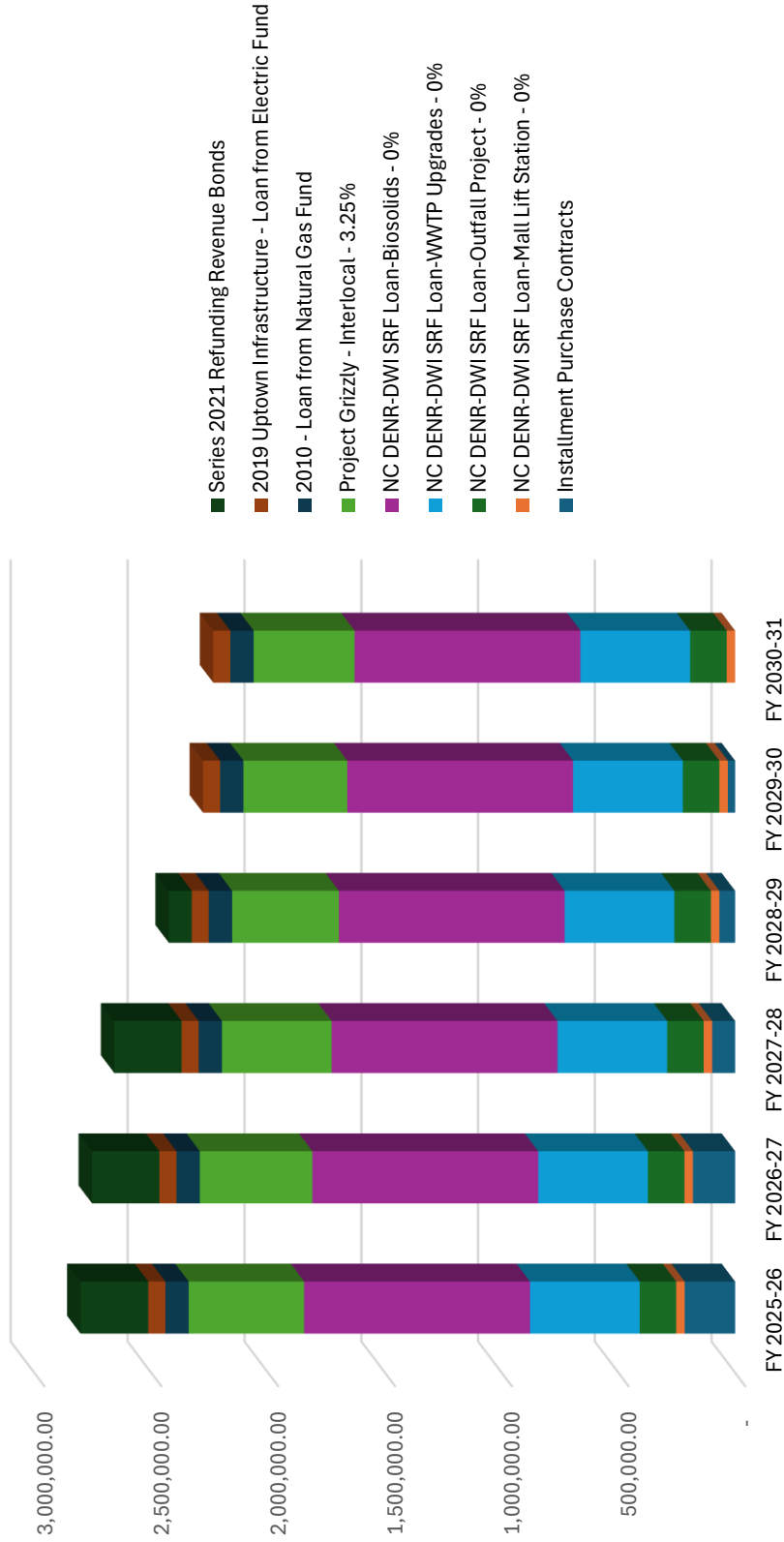
	967,046.85	967,046.85	967,046.85	967,046.85	967,046.85	967,046.85
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Project Grizzly - Interlocal - 3.25%**Principal
3.25% Interest**

Principal	407,155.35	407,155.35	407,155.35	407,155.35	407,155.35	407,155.35
3.25% Interest	86,452.62	74,102.25	61,751.87	49,401.50	37,051.12	24,700.75
Debt Retired in 2032	493,607.97	481,257.59	468,907.22	456,556.84	444,206.47	431,856.10

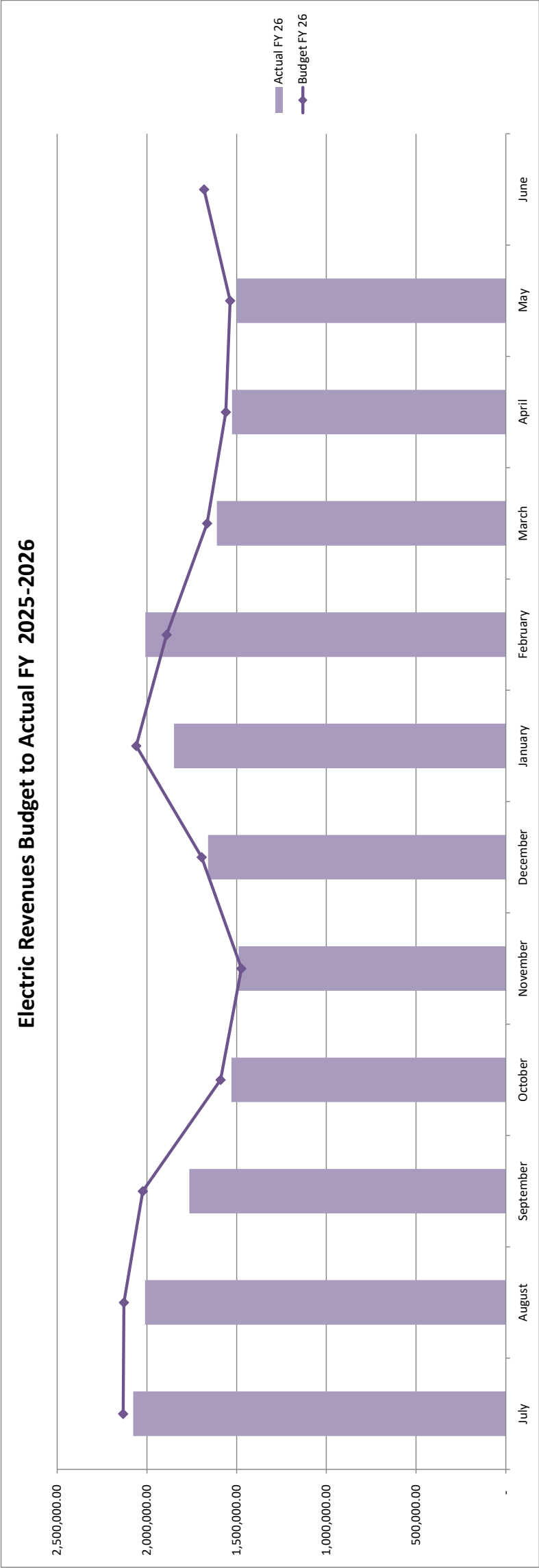
DEBT SERVICE - SEWER FUND		FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31
<i>Installment Purchase Contracts</i>							
2010 - Loan from Natural Gas Fund		100,000.00	100,000.00	100,000.00	100,000.00	100,000.00	100,000.00
0% Debt Retired in 2033							
2019 Uptown Infrastructure - Loan from Electric		72,750.00	72,750.00	72,750.00	72,750.00	72,750.00	72,750.00
0% Debt Retired in 2038							
FY 21 Installment Purchase		6,172.52		-	-		
Debt Retired in 2026							
FY 22 Installment Purchase		50,913.19	50,913.19		-		
Debt Retired in 2027							
FY 23 Installment Purchase		91,762.10	62,697.37	31,085.68			
Debt Retired in 2028							
FY 24 Installment Purchase		35,939.56	35,939.56	35,939.56	35,939.56		
Debt Retired in 2029							
FY 25 Installment Purchase		31,305.25	31305.25	31305.25	31305.25	31,305.25	
Debt Retired in 2030							
Total Installment Debt		216,092.62	180,855.37	98,330.49	67,244.81	31,305.25	
Total Debt Service - Sewer Fund		2,801,974.00	2,752,690.45	2,657,531.92	2,424,086.10	2,277,963.47	2,234,307.85

Sewer Fund Debt Service - this year and next 5 years

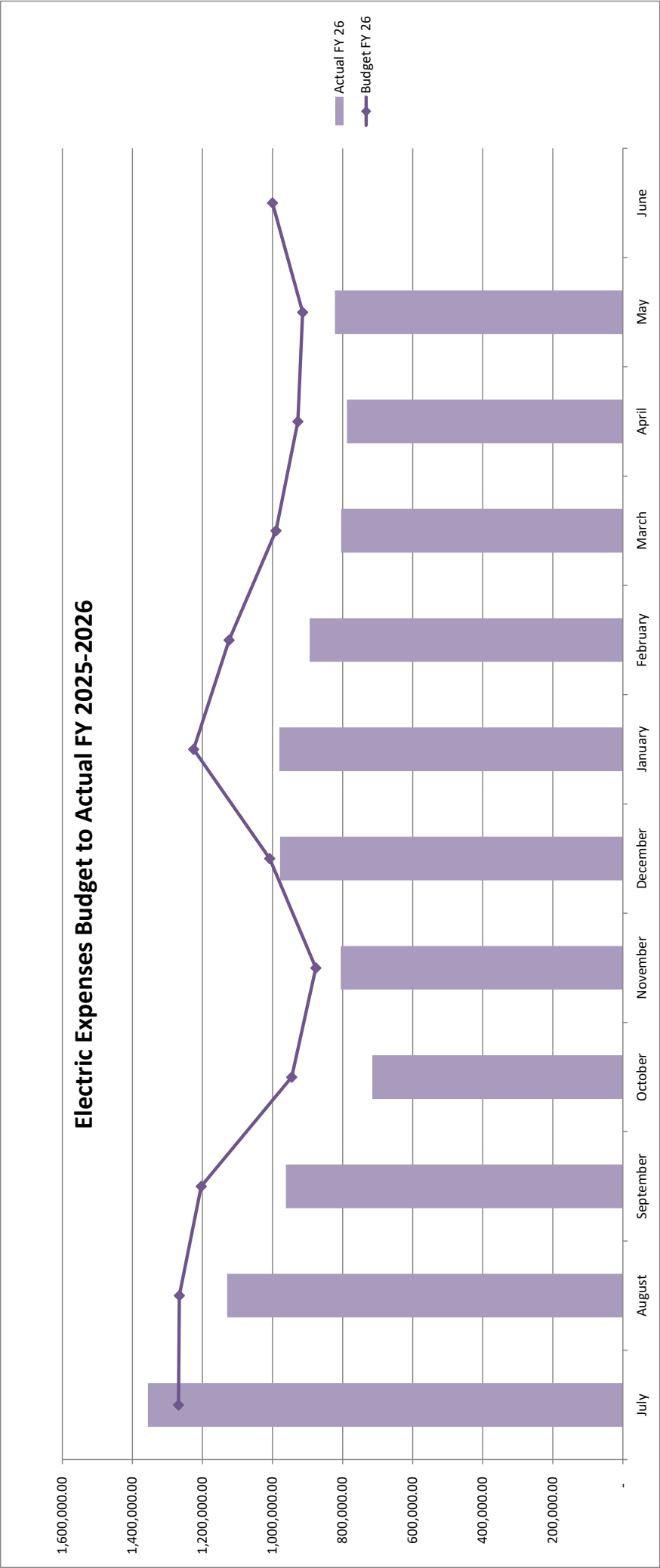


City of Shelby
Electric Revenues Budget to Actual
FY 2026

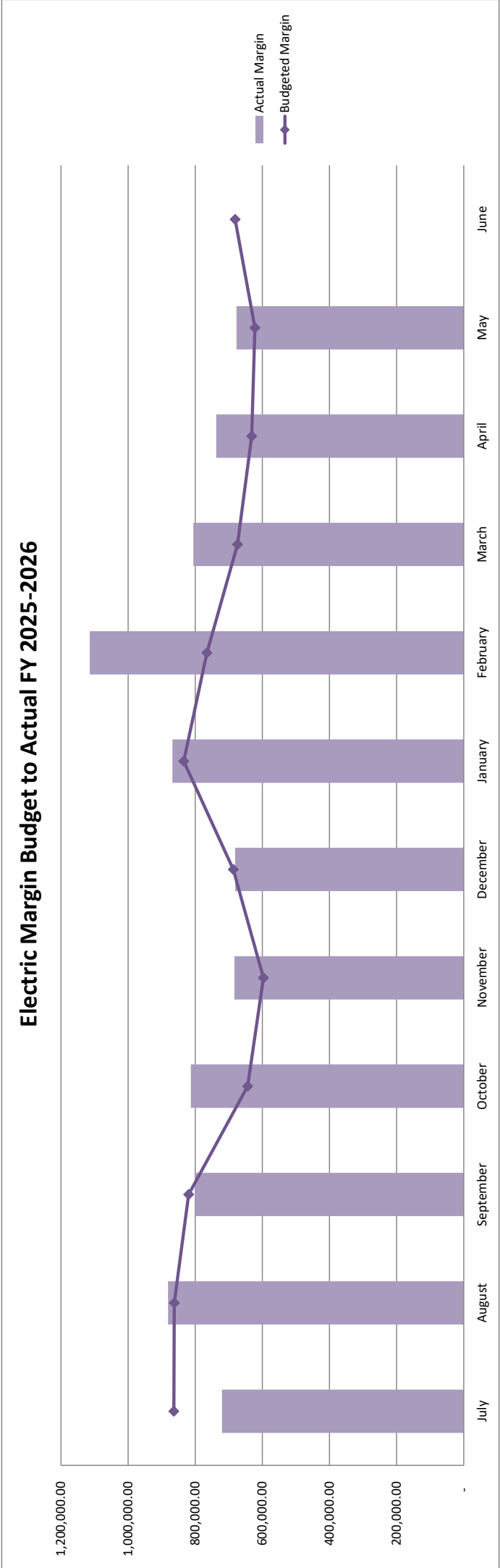
Revenues Budget FY 26	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Residential	929,775.32	904,104.45	831,468.92	607,247.94	593,682.42	796,180.40	1,074,100.34	946,660.49	766,939.59	663,977.52	619,719.19	709,383.19	9,443,239.76
Commercial/Industrial	1,202,496.07	1,224,338.65	1,191,680.20	981,999.59	879,653.88	898,713.49	985,721.14	942,978.04	897,543.71	895,825.50	916,421.65	971,888.32	11,989,260.24
Totals	2,132,271.39	2,128,443.10	2,023,149.12	1,589,247.53	1,473,336.30	1,694,893.89	2,059,821.48	1,889,638.54	1,664,483.29	1,559,803.02	1,536,140.84	1,681,271.51	21,432,500.00
Actual FY 26	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Residential	938,511.73	881,852.33	718,936.64	615,678.07	639,193.54	816,753.83	964,247.20	1,064,969.48	761,416.51	677,860.33	638,746.77		8,718,166.43
Commercial/Industrial	1,137,778.91	1,128,979.32	1,044,428.15	913,046.25	849,393.34	842,736.85	884,676.36	943,457.73	848,583.77	847,836.18	860,466.77		10,301,383.63
Totals	2,076,290.64	2,010,831.65	1,763,364.79	1,528,724.32	1,488,586.88	1,659,490.68	1,848,923.56	2,008,427.21	1,610,000.28	1,525,696.51	1,499,213.54	-	19,019,550.06
Revenue Variance	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Residential	8,736.41	(22,252.12)	(112,532.28)	8,430.13	45,511.12	20,573.43	(109,853.14)	118,308.99	(5,523.08)	13,882.81	19,027.58	(709,383.19)	(725,073.33)
Commercial/Industrial	(64,717.16)	(95,359.33)	(147,252.05)	(68,953.34)	(30,260.54)	(55,976.64)	(101,044.78)	479.69	(48,959.94)	(47,989.32)	(55,954.88)	(971,888.32)	(1,687,876.61)
	(55,980.75)	(117,611.45)	(259,784.33)	(60,523.21)	15,250.58	(35,403.21)	(210,897.92)	118,788.67	(54,483.01)	(34,106.51)	(36,927.30)	(1,681,271.51)	(2,412,949.94)



Expenses												
Budget FY 26												
	July	August	September	October	November	December	January	February	March	April	May	Totals
NCMPA1	1,225,689.19	1,223,488.58	1,162,962.66	913,543.90	846,914.88	974,272.38	1,184,042.95	1,086,217.04	956,791.52	896,618.37	883,016.69	12,320,000.00
SEPA	42,779.74	42,702.93	40,590.42	31,885.05	29,559.53	34,004.64	41,326.17	37,911.80	33,394.51	31,294.31	30,819.58	430,000.00
Totals	1,268,468.93	1,266,191.51	1,203,553.08	945,428.95	876,474.41	1,008,277.01	1,225,369.13	1,124,128.84	990,186.03	927,912.68	913,836.26	12,750,000.00
Actual FY 26												
	July	August	September	October	November	December	January	February	March	April	May	Totals
NCMPA1	1,314,633.32	1,091,365.05	925,299.84	677,282.08	766,500.34	935,157.85	941,498.48	851,726.63	771,006.32	753,321.86	786,787.25	9,814,579.02
wholesale power 1st d	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	\$20.93/kW	
energy charges 1st blo	\$.0359/kWh	\$.0359/kWh	\$.0359/kWh	\$.0339/kWh	.0339/kWh	.0339/kWh	.0339/kWh	.0339/kWh	.0339/kWh	.0339/kWh	.0339/kWh	
SEPA	41,277.22	38,284.26	36,696.47	38,117.99	38,743.54	43,314.80	39,275.63	42,459.78	33,330.32	34,615.71	35,373.91	421,489.63
capacity rate	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	4.16/kW	
avg energy cost	.089/kWh	.088/kWh	.088/kWh	.098/kWh	.119/kWh	.099/kWh	.103/kWh	.123/kWh	.120/kWh	.144/kWh	.119/kWh	
Totals	1,355,910.54	1,129,649.31	961,996.31	715,400.07	805,243.88	978,472.65	980,774.11	894,186.41	804,336.64	787,937.57	822,161.16	10,236,068.65
Expense Variance												
	July	August	September	October	November	December	January	February	March	April	May	Totals
NCMPA1	(88,944.13)	132,123.53	237,662.82	236,261.82	80,414.54	39,114.53	242,544.47	234,490.41	185,785.20	143,296.51	96,229.44	2,505,420.98
SEPA	1,502.52	4,418.67	3,893.95	(6,232.94)	(9,184.01)	(9,310.16)	2,050.54	(4,547.98)	64.19	(3,321.40)	(4,554.33)	8,510.37
Totals	(87,441.61)	136,542.20	241,556.77	230,028.88	71,230.53	29,804.36	244,595.02	229,942.43	185,849.39	139,975.11	91,675.10	2,513,931.35



Margin	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Budgeted Revenues	2,132,271.39	2,128,443.10	2,023,149.12	1,589,247.53	1,473,336.30	1,694,893.89	2,059,821.48	1,889,638.54	1,664,483.29	1,559,803.02	1,536,140.84	1,681,271.51	21,432,500.00
Budgeted Expenses	(1,268,468.93)	(1,266,191.51)	(1,203,553.08)	(945,428.95)	(876,474.41)	(1,008,277.01)	(1,225,369.13)	(1,124,128.84)	(990,186.03)	(927,912.68)	(913,836.26)	(1,000,173.18)	(12,750,000.00)
Budgeted Margin	863,802.47	862,251.59	819,596.05	643,818.58	596,861.89	686,616.88	834,452.35	765,509.70	674,297.27	631,890.34	622,304.58	681,098.33	8,682,500.00
Actual Revenues	2,076,290.64	2,010,831.65	1,763,364.79	1,528,724.32	1,488,586.88	1,659,490.68	1,848,923.56	2,008,427.21	1,610,000.28	1,525,696.51	1,499,213.54	-	19,019,550.06
Actual Expenses	(1,355,910.54)	(1,129,649.31)	(961,996.31)	(715,400.07)	(805,243.88)	(978,472.65)	(980,774.11)	(894,186.41)	(804,336.64)	(787,937.57)	(822,161.16)	-	(10,236,068.65)
Actual Margin	720,380.10	881,182.34	801,368.48	813,324.25	683,343.00	681,018.03	868,149.45	1,114,240.80	805,663.64	737,758.94	677,052.38	-	8,783,481.41
Margin Variance	(143,422.37)	18,930.75	(18,227.57)	169,505.67	86,481.11	(5,598.85)	33,697.10	348,731.10	131,366.37	105,868.60	54,747.80	(681,098.33)	100,981.41



DEBT SERVICE - ELECTRIC FUND**FY 2025-26 FY 2026-27 FY 2027-28 FY 2028-29 FY 2029-30 FY 2030-31****Revenue Bonds****Series 2021 Refunding Revenue Bonds**

Principal	239,138.82	240,834.84	246,262.10	249,314.94	-	-
Interest	12,819.53	9,466.84	6,076.16	2,618.99	-	-
Debt Retired in 2031	251,958.35	250,301.68	252,338.26	251,933.93	-	-

Installment Purchase Contracts**FY 21 Installment Purchase**

Debt Retired in 2026	89,337.65
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FY 22 Installment Purchase

Debt Retired in 2027	74,290.23
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FY 23 Installment Purchase

Debt Retired in 2028	66,232.10	45,253.74	22,437.05
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FY 24 Installment Purchase

Debt Retired in 2029	112,072.59	112,072.59	112,072.59
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FY 25 Installment Purchase

Debt Retired in 2030	11,180.45	11,180.44	11,180.44	11,180.45	11,180.45
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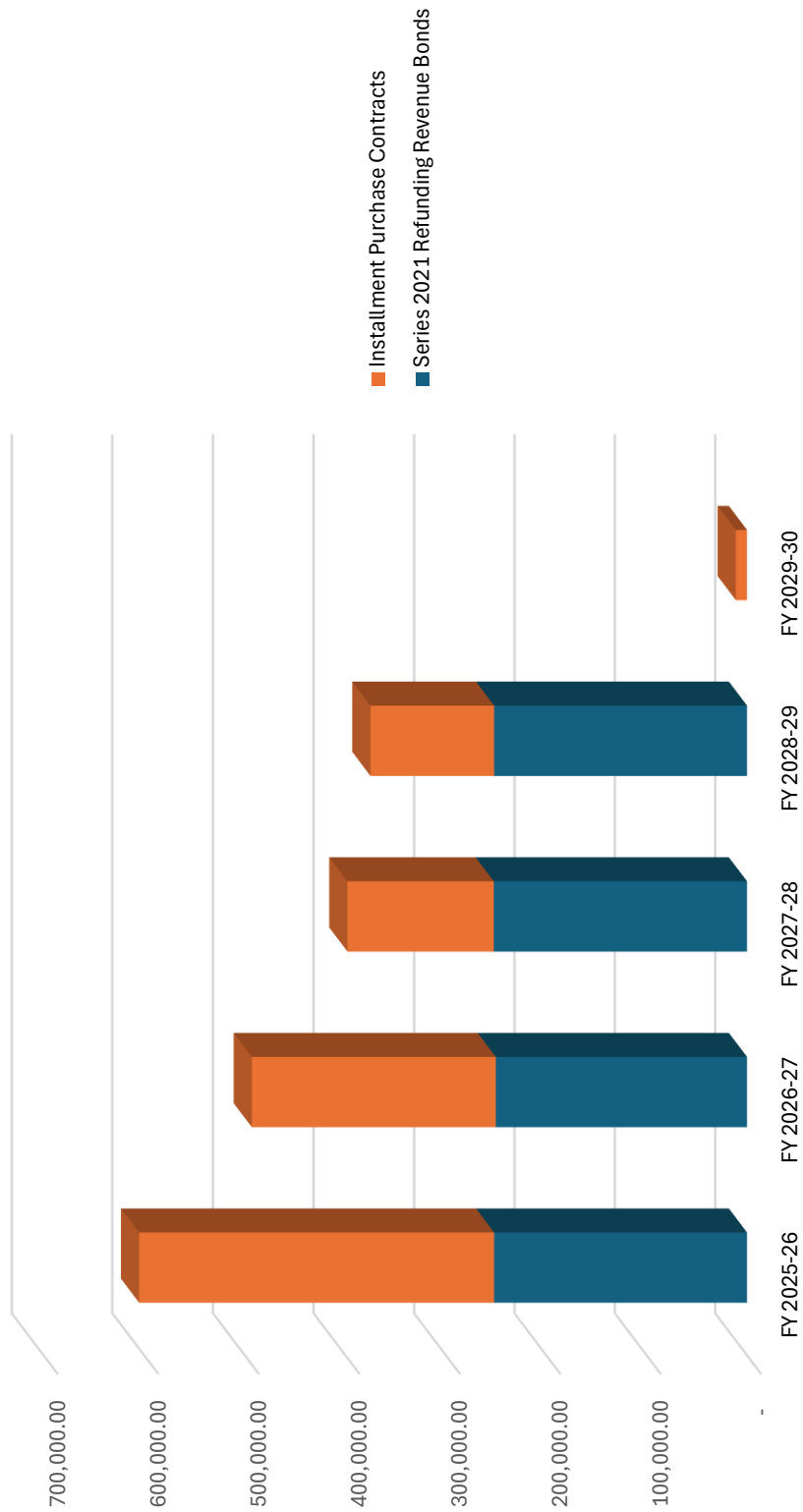
Total Installment Debt

	353,113.02	242,797.00	145,690.08	123,253.04	11,180.45
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Total Debt Service - Electric Fund

	605,071.37	493,098.68	398,028.34	375,186.97	11,180.45	-
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Electric Fund Debt Service - this year and next 5 years



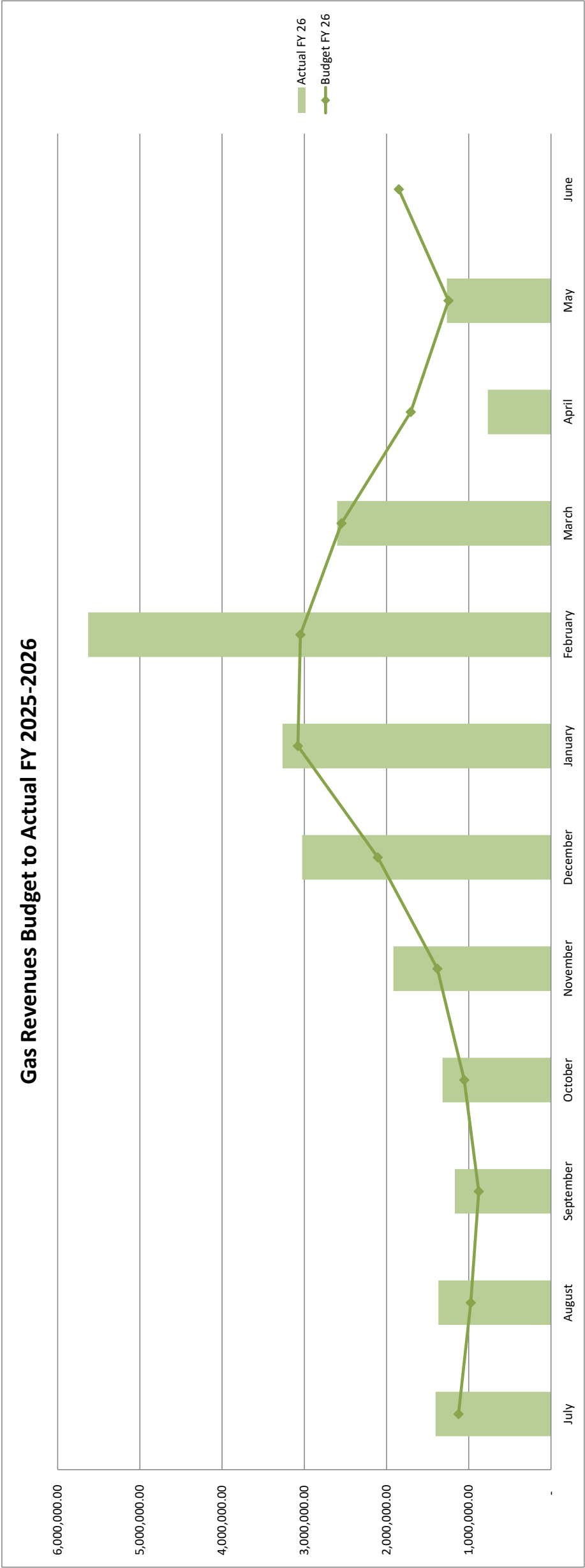
Revenues Budget FY 26	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Residential	122,297.76	115,215.27	123,501.93	143,519.89	220,165.62	581,262.07	949,372.32	958,941.34	640,985.22	293,120.29	178,880.71	765,344.73	5,092,607.15
Commercial	149,923.99	137,540.73	136,105.65	147,502.66	235,366.51	551,602.18	869,135.20	887,667.37	617,178.90	307,345.83	223,423.82	177,853.32	4,440,646.16
High Load Factor	15,097.10	14,097.37	12,830.74	13,985.82	15,257.65	25,917.21	26,807.18	26,603.01	23,652.84	20,564.95	22,072.26	24,027.88	240,914.02
Interruptibles	67,938.68	53,473.91	56,068.00	54,973.69	63,752.80	76,625.29	93,949.87	102,927.25	80,083.55	84,382.58	71,209.79	64,239.03	869,624.42
Special Ind Class	768,893.29	656,012.46	550,115.56	694,380.86	847,719.33	871,565.33	1,138,930.03	1,071,679.32	1,185,392.27	1,000,688.50	751,095.71	819,735.59	10,356,208.25
Totals	1,124,150.82	976,339.74	878,621.88	1,054,362.91	1,382,261.91	2,106,972.09	3,078,194.60	3,047,818.29	2,547,292.77	1,706,102.15	1,246,682.29	1,851,200.55	21,000,000.00

Actual FY 26	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Residential	131,437.24	124,966.17	130,991.23	142,556.99	340,347.94	676,324.24	897,660.49	1,316,134.47	711,382.96	299,578.62	178,433.61		4,949,813.96
Commercial	169,815.71	161,489.32	174,920.40	179,802.22	331,031.71	667,492.09	814,298.25	1,284,187.61	725,382.96	338,469.96	208,242.16		5,055,132.39
High Load Factor	21,999.76	20,590.44	19,805.67	18,962.38	21,118.92	24,926.08	28,140.57	41,993.08	27,323.71	19,887.60	18,565.52		263,313.73
Interruptibles	77,938.24	76,366.82	76,924.77	65,679.11	84,699.61	92,011.86	118,958.15	136,183.76	113,173.95	79,652.36	67,187.49		988,776.12
Special Ind Class	1,002,382.54	986,028.72	767,103.24	910,706.89	1,138,683.14	1,565,489.39	1,405,798.47	2,850,962.66	1,022,371.31	726,218.16	793,730.57		13,169,475.09
Year End GL to Sales Report Reconciliation				corr for Oct NEG						-695,812.97			
Totals	1,403,573.49	1,369,441.47	1,169,745.31	1,317,707.59	1,915,881.32	3,026,243.66	3,264,855.93	5,629,461.58	2,599,634.89	767,993.73	1,266,159.35	-	23,730,698.32

corr Sept-Jan

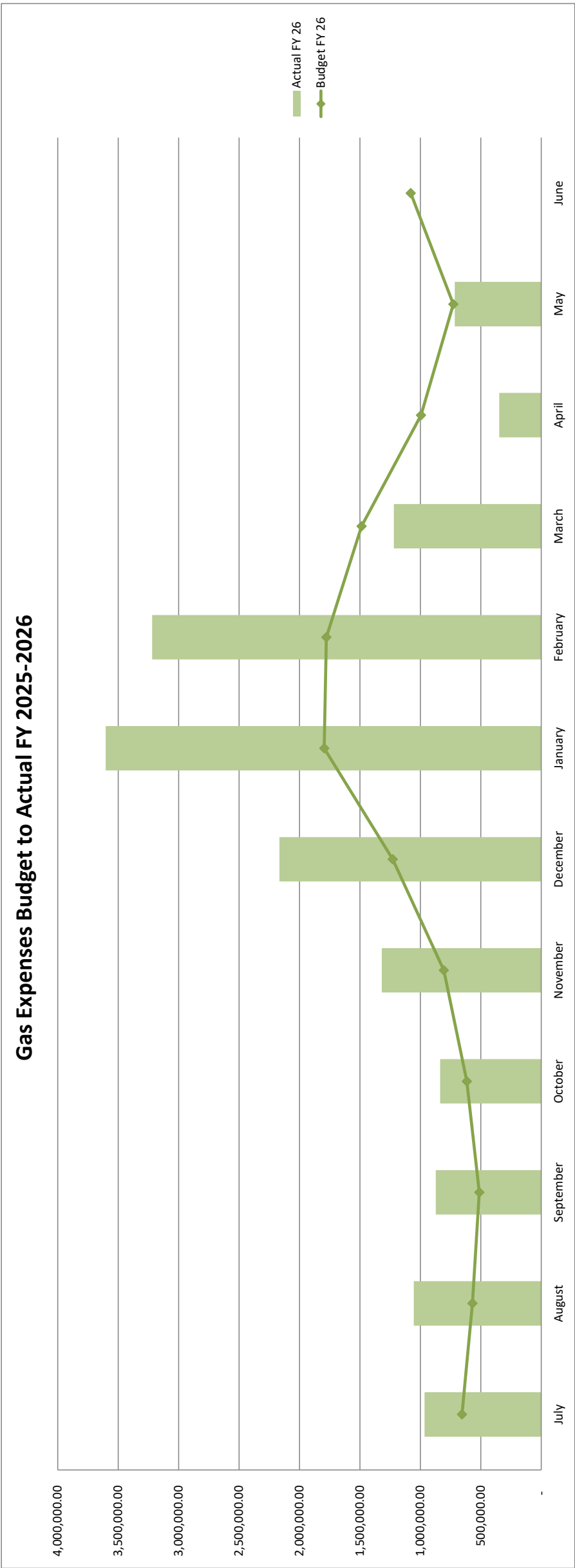
Revenue Variance	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Residential	9,139.48	9,750.90	7,489.30	(962.90)	120,182.32	95,062.17	(51,711.83)	357,193.13	70,397.74	6,458.33	(447.10)	(765,344.73)	(142,793.19)
Commercial	19,891.72	23,948.59	38,814.75	32,299.56	95,665.20	115,889.91	(54,836.95)	396,520.24	108,204.06	31,124.13	(15,181.66)	(177,853.32)	614,486.23
High Load Factor	6,902.66	6,493.07	6,974.93	4,976.56	5,861.27	(991.13)	1,333.39	15,390.07	3,670.87	(677.35)	(3,506.74)	(24,027.88)	22,399.71

Interruptibles	9,999.56	22,892.91	20,856.77	10,705.42	20,946.81	15,386.57	25,008.28	33,256.51	33,090.40	(4,730.22)	(4,022.30)	(64,239.03)	119,151.70
Special Ind Class	233,489.25	330,016.26	216,987.68	216,326.03	290,963.81	693,924.06	266,868.44	1,779,283.34	(163,020.96)	(274,470.34)	42,634.86	(819,735.59)	2,813,266.84
Totals	279,422.67	393,101.73	291,123.43	263,344.68	533,619.41	919,271.57	186,661.33	2,581,643.29	52,342.12	(938,108.42)	19,477.06	(1,851,200.55)	2,730,698.32



Cost of Gas Expenses		July	August	September	October	November	December	January	February	March	April	May	June	Totals
Budget FY 26		655,754.65	569,531.52	512,529.43	615,045.03	806,319.45	1,229,067.05	1,795,613.52	1,777,894.00	1,485,920.78	995,226.25	727,231.34	1,079,866.99	12,250,000.00
Actual FY 26		965,660.84	1,055,051.01	872,134.32	837,007.00	1,319,216.40	2,165,975.57	3,603,850.03	3,218,613.75	1,219,865.08	347,158.42	715,963.09		16,320,495.51
Cycle 1 WAGOG		3.8807	3.6944	3.3230	3.1717	3.9727	5.7893	5.9283	9.8504	3.7916	3.2248	2.7156		
Cycle 2 WACOG		3.7876	3.5087	3.2474	3.5722	4.8810	5.8588	7.8894	6.8210	3.5082	2.9702	3.1313		
Cycle 3 WAGOG		3.6944	3.3230	3.1717	3.9727	5.7893	5.9283	9.8504	3.7916	3.2248	2.7156	3.5469		
Expense Variance		(309,906.19)	(485,519.49)	(359,604.89)	(221,961.97)	(512,896.95)	(936,908.52)	(1,808,236.51)	(1,440,719.75)	266,055.70	648,067.83	11,268.25	1,079,866.99	(4,070,495.51)

Transco Rate Refund = \$422,548.87



Margin	July	August	September	October	November	December	January	February	March	April	May	June	Totals
Budgeted Revenues	1,124,150.82	976,339.74	878,621.88	1,054,362.91	1,382,261.91	2,106,972.09	3,078,194.60	3,047,818.29	2,547,292.77	1,706,102.15	1,246,682.29	1,851,200.55	21,000,000.00
Budgeted Expenses	655,754.65	569,531.52	512,529.43	615,045.03	806,319.45	1,229,067.05	1,795,613.52	1,777,894.00	1,485,920.78	995,226.25	727,231.34	1,079,866.99	12,250,000.00
Budgeted Margin	468,396.18	406,808.23	366,092.45	439,317.88	575,942.46	877,905.04	1,282,581.08	1,269,924.29	1,061,371.99	710,875.90	519,450.95	771,333.56	8,750,000.00
Actual Revenues	1,403,573.49	1,369,441.47	1,169,745.31	1,317,707.59	1,915,881.32	3,026,243.66	3,264,855.93	5,629,461.58	2,599,634.89	767,993.73	1,266,159.35	-	23,730,698.32
Actual Expenses	965,660.84	1,055,051.01	872,134.32	837,007.00	1,319,216.40	2,165,975.57	3,603,850.03	3,218,613.75	1,219,865.08	347,158.42	715,963.09	-	16,320,495.51
Actual Margin	437,912.65	314,390.46	297,610.99	480,700.59	596,664.92	860,268.09	(338,994.10)	2,410,847.83	1,379,769.81	420,835.31	550,196.26	-	7,410,202.81
Margin Variance	(30,483.53)	(92,417.77)	(68,481.46)	41,382.71	20,722.46	(17,636.95)	(1,621,575.18)	1,140,923.54	318,397.82	(290,040.59)	30,745.31	(771,333.56)	(1,339,797.19)

Gas Margin Budget to Actual FY 2025-2026



DEBT SERVICE - GAS FUNDRevenue Bonds**Series 2021 Refunding Revenue Bonds**

Principal	134,680.29	135,703.98	137,967.78	82,862.43		
Interest	6,405.23	4,516.52	2,608.73	870.45		
Debt Retired in 2031	141,085.52	140,220.50	140,576.51	83,732.88	-	

Project Grizzly - Interlocal - 3.25%

Principal	84,560.60	84,560.60	84,560.60	84,560.60	84,560.60	84,560.60
3.25% Interest	17,955.03	15,390.02	12,825.02	10,260.02	7,695.01	5,130.01
Debt Retired in 2032	102,515.63	99,950.62	97,385.62	94,820.62	92,255.61	89,690.61

Installment Purchase Contracts**FY 21 Installment Purchase**

Debt Retired in 2026	24,225.77
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FY 22 Installment Purchase

Debt Retired in 2027	25,145.86
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FY 23 Installment Purchase

Debt Retired in 2028	23,244.45	15,882.00	7,874.38
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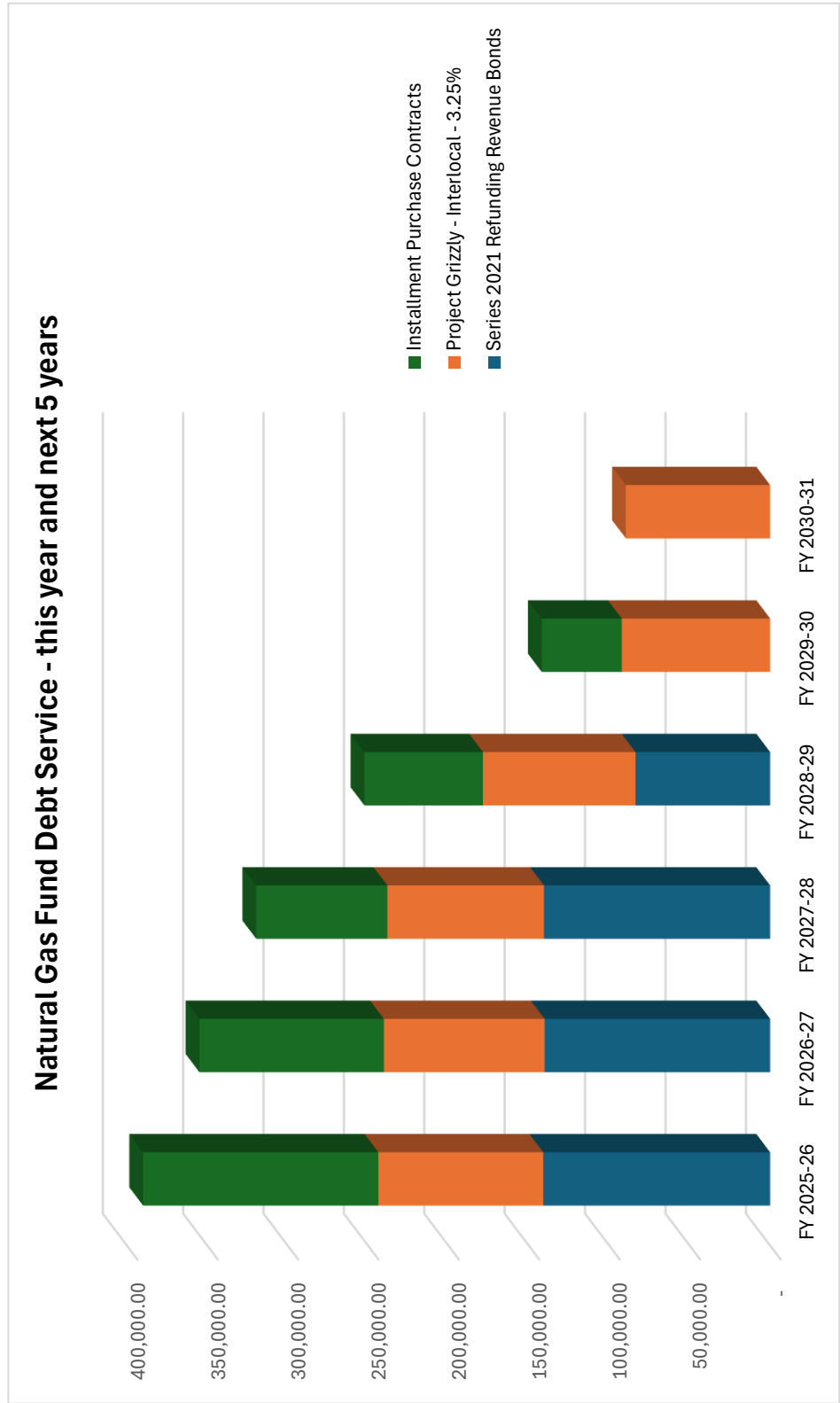
FY 24 Inallment Purchase

Debt Retired in 2029	24,012.71	24,012.71	24,012.71	24,012.71
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FY 25 Inallment Purchase

Debt Retired in 2030	49,752.98	49,752.98	49,752.98	49,752.98	49,753.00
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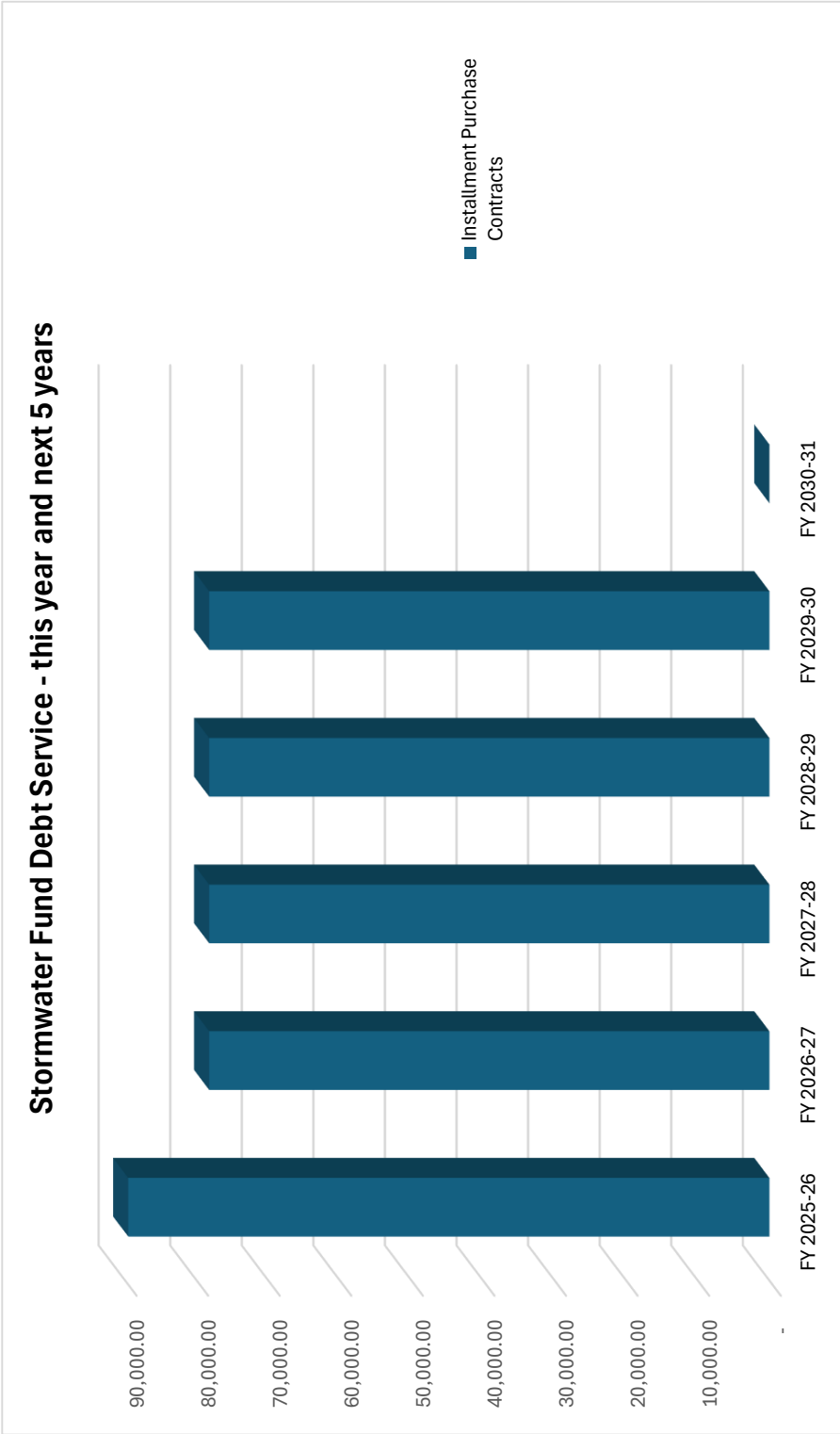
DEBT SERVICE - GAS FUND		FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29	FY 2029-30	FY 2030-31
Total Installment Purchase Contracts		146,381.77	114,793.55	81,640.07	73,765.69	49,753.00	
Total Debt Service - Gas Fund		389,982.92	354,964.68	319,602.20	252,319.19	142,008.61	89,690.61



DEBT SERVICE - STORMWATER FUND FY 2025-26 FY 2026-27 FY 2027-28 FY 2028-29 FY 2029-30 FY 2030-31

Installment Purchase Contracts

FY 21 Installment Purchase	11,304.84								
Debt Retired in 2026									
FY25 Installment Purchase	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	
Debt Retired in 2030									
Total Debt Service - Stormwater Fund	89,567.97	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	78,263.13	-



City of Shelby
YTD Budget Report
For 5/31/2026 (91.67% of Fiscal Year)

ACCOUNT DESCRIPTION	ORIG APPROP	REVISED BUDGET	YTD EXPENDED	ENCUMB	AVAIL BUDGET	% USED
Total 610711 WATER ADMINISTRATION	3,597,120	4,381,436	3,871,569.33	45,861.58	464,005	89.40 %
Total 610713 WATER LINES OPERATIONS	1,821,948	1,718,940	1,357,255.56	320,164.17	41,521	97.60 %
Total 610714 WATER PLANT OPERATIONS	2,423,205	2,497,066	2,308,237.43	96,764.53	92,064	96.30 %
Total 610 WATER FUND	7,842,273	8,597,443	7,537,062.32	462,790.28	597,590	93.00 %

ACCOUNT DESCRIPTION	ORIG APPROP	REVISED BUDGET	YTD EXPENDED	ENCUMB	AVAIL BUDGET	% USED
Total 620721 SEWER ADMINISTRATION	3,689,678	3,719,253	3,185,533.47	17,986.16	515,733	86.10 %
Total 620723 SEWER LINES OPERATIONS	1,672,723	2,012,472	1,566,415.98	19,727.94	426,328	78.80 %
Total 620724 SEWER PLANT OPERATIONS	2,989,774	3,124,388	2,662,547.71	219,410.21	242,430	92.20 %
Total 620 SEWER FUND	8,352,175	8,856,113	7,414,497.16	257,124.31	1,184,492	86.60 %

ACCOUNT DESCRIPTION	ORIG APPROP	REVISED BUDGET	YTD EXPENDED	ENCUMB	AVAIL BUDGET	% USED
Total 630731 ELECTRIC ADMINISTRATION	3,949,026	5,732,896	5,062,505.16	22,807.56	647,584	88.70 %
Total 630732 ELECTRIC PURCHASE	14,070,000	14,070,000	11,403,358.67	0.00	2,666,641	81.00 %
Total 630733 ELECTRIC LINES	4,197,084	6,546,722	4,701,344.18	1,467,296.28	378,082	94.20 %
Total 630734 ECONOMIC DEVELOPMENT	219,200	219,200	125,258.10	0.00	93,942	57.10 %
Total 630 ELECTRIC FUND	22,435,310	26,568,819	21,292,466.11	1,490,103.84	3,786,249	85.70 %

ACCOUNT DESCRIPTION	ORIG APPROP	REVISED BUDGET	YTD EXPENDED	ENCUMB	AVAIL BUDGET	% USED
Total 640741 NATURAL GAS ADMINISTRATION	5,091,964	7,385,646	6,760,978.60	31,179.26	593,488	92.00 %
Total 640742 NATURAL GAS PURCHASE	13,200,000	18,800,000	16,392,559.49	0.00	2,407,441	87.20 %
Total 640743 NATURAL GAS LINES	3,582,239	4,083,160	3,385,211.61	179,698.71	518,250	87.30 %
Total 640 NATURAL GAS FUND	21,874,203	30,268,806	26,538,749.70	210,877.97	3,519,178	88.40 %

ACCOUNT DESCRIPTION	ORIG APPROP	REVISED BUDGET	YTD EXPENDED	ENCUMB	AVAIL BUDGET	% USED
Total 650751 STORMWATER ADMINISTRATION	1,833,457	2,161,704	1,497,740.29	449,418.56	214,545	90.10 %
Total 650 STORMWATER FUND	1,833,457	2,161,704	1,497,740.29	449,418.56	214,545	90.10 %

City of Shelby
Weather Variances
Fiscal Year to Date at May 31, 2026

Month	Average Rain*	Actual Rain	Variance	Average CDD**	Actual CDD	Variance	Average HDD**	Actual HDD	Variance
July	4.47	4.30	(0.17)	436	594	158	0	0	0
August	4.27	5.80	1.53	377	342	-35	0	0	0
September	3.07	5.10	2.03	231	222	-9	14	2	-12
October	3.88	2.80	(1.08)	52	51	-1	171	178	7
November	4.43	0.90	(3.53)	3	1	-2	486	356	-130
December	5.21	2.10	(3.11)	0	0	0	628	648	20
January	4.36	5.20	0.84	0	0	0	765	772	7
February	4.08	3.00	(1.08)	2	7	5	575	578	3
March	3.85	1.80	(2.05)	4	38	34	459	253	-206
April	5.23	1.10	(4.13)	25	68	43	217	101	-116
May	4.29	5.10	0.81	136	147	11	61	77	16
June	3.57		(3.57)	306		-306	1		-1
Totals	50.71	37.20	(13.51)	1,572	1,470	(102)	3,377	2,965	(412)

Heating Degree Days: This is a value which gives an indication of the need to heat a building in a given climate.
The number of heating degrees in a day is defined as the difference between a reference value of 65°F and the average outside temperature for that day.

Cooling Degree Days: This is a value which gives an indication of the need to cool a building in a given climate.
The number of cooling degrees in a day is defined as the difference between a reference value of 65°F and the average outside temperature for that day.

* Source www.weather.com [Climate \(weather.gov\)](https://climate.weather.gov) Data for 2024 was pulled using Location: Shelby 2 Nne, NC; Product: Monthly Summarized Data; Year Range 2013 - 2023.

** Source www.climate.fizber.com

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

F. Unfinished Business

None

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: G

New Business

- 1) Adoption of FY 2026-2027 Budget Ordinance Amendment No. 1 (Cemetery Perpetual Fund): Ordinance No. 33-2026 (Charlie Holtzclaw, presenting)

Consent Agenda Item: (Charlie Holtzclaw, Parks and Recreation Director)

Summary of Available Information:

- Slides of presentation
- Ordinance No. 33-2026

City Manager's Recommendation / Comments

The Budget Ordinance Amendment before City Council seeks to appropriate Cemetery Perpetual Care Funds to make improvements in Sunset Cemetery. These perpetual care funds can only be used for maintenance and care of City owned cemeteries (Sunset, Webb Memorial and Eastside). In FY 2026, \$50,000 was appropriated to install new street signs, install section markers, repair gravestones, repair or install entry signs and other enhancement projects within Sunset and Webb Memorial Cemeteries.

This specific amendment, if approved, would allow conversion of approximately 3,200 linear feet of gravel road to an improved asphalt surface. This will create safer and more durable access to the more recently opened section of Sunset Cemetery. Generally, all other streets within the cemetery have an asphalt surface and this would be an extension of that. The total estimated cost of this project is \$62,000.

It is my recommendation that Ordinance No. 33-2026 be adopted and approved by City Council at this time via the Consent Agenda.

Cemetery Improvements 2026-2027

- "Perpetual care trust fund" means a trust fund that provides for the perpetual care and maintenance of a cemetery. The term includes a care and maintenance trust fund, a perpetual care fund, and a perpetual trust fund.

Improvements Performed in 2025-2026 at Sunset Cemetery and Webb Memorial Lawns

- A total of about \$50,000 spent between the two cemeteries
- 36 new two-sided street signs at Sunset
- 52 granite section markers at Sunset
- 30 granite grave monuments restored at Sunset
- New aluminum sign at Webb
- New entry plaque at Webb
- 10 new two-sided street signs at Webb
- Beautification benches at Webb (Scout Project)
- Trash receptacle repairs, corner posts, etc. both cemeteries

Sunset Cemetery Street Signs



Sunset Cemetery Section Markers



Sunset Cemetery Grave Monument Before



Sunset Cemetery Grave Monuments After



Webb Memorial Lawns Signage



Webb Memorial Lawns Plaque



Webb Memorial Lawns Street Signs



2026-2027 Recommendation

- Sunset Cemetery has approximately 3,200 LF feet of gravel / unpaved streets that are located in the newer and most visited sections.
- With a total of \$62,000 in available funds, depending on the costs at the time, the majority of the existing gravel roads can be paved with asphalt.



Existing Gravel Roads

Sunset Cemetery Road Improvements



ArcGIS Web Map



5/8/2026, 7:52:10 AM

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ORDINANCE NO. 33-2026
CITY OF SHELBY
FY 2026-2027 BUDGET ORDINANCE AMENDMENT

WHEREAS, in accordance with applicable provisions of the North Carolina Budget and Fiscal Control Act, the City of Shelby finds it advisable and necessary to revise and amend its annual budget for FY 2026-2027; and,

WHEREAS, the City Manager (Budget Officer) has recommended certain amendments to the budget which the governing body finds acceptable; and,

WHEREAS, City Council now desires to act on the recommended budget amendments and approve same for implementation and compliance with the Fiscal Control Act;

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SHELBY, NORTH CAROLINA:

Section 1. Ordinance No. 20-2026, the City's FY 2026-2027 Budget Ordinance, is hereby amended as follows to provide for Budget Amendment No. 1 for the year:

(1) The following Cemetery Perpetual Fund line items are amended:

(a) Increase 71707000-39900	\$ 62,000
Fund Balance Appropriated	
(b) Increase 717817-42000	\$ 62,000
Professional Services	

Section 2. That the revenues, expenditures and amendments set forth in Section 1 of this ordinance are hereby summarized as follows:

	<u>Current Budget</u>	<u>Amendment No. 1</u>
General Fund	\$ 38,393,332	\$ 38,393,332
Emergency Telephone System Fund	109,491	109,491
Powell Bill Fund	938,480	938,480
Economic Dev. Fund	2,089,000	2,089,000
Affordable Housing	0	0
Housing Fund	2,931,478	2,931,478
Cemetery Fund	0	62,000
Utilities-Water Fund	8,706,088	8,706,088
Utilities-Sewer Fund	8,904,565	8,904,565
Utilities-Electric Fund	22,556,106	22,556,106
Utilities-Gas Fund	23,755,614	23,755,614
Utilities – Stormwater Fund	1,409,487	1,409,487
FY 2024-2025 Budget Total	<u>\$109,793,641</u>	<u>\$109,855,641</u>

Section 3. Copies of this Budget Ordinance Amendment shall be furnished to the City Manager as Budget Officer and to the Finance Director to be kept on file by them for their direction in the collection and disbursement of funds. Said officials are hereby authorized to receive and expend funds as herein set forth in accordance with the Shelby City Code, the General Statutes of North Carolina, and the provisions of the original budget ordinance; inclusive of GS 159-28 governing budgetary accounting of appropriations.

Ordinance No. 33-2026
July 20, 2026
Page 2

Section 4. This ordinance shall become effective upon its adoption and approval.

Adopted and approved this the 20th day of July A. D. 2026.

O. Stanhope Anthony, III
Mayor

ATTEST:

Carol Williams
City Clerk

APPROVED AS TO FORM:

Jason Lunsford
City Attorney

City of Shelby
Agenda Item Summary
July 20, 2026
City Hall Council Chambers

Agenda Item: H

City Manager's Report

I will report to Mayor and Council about ongoing projects and issues. The projects and issues reported upon are intended to be for your information and do not necessarily require action by Council.

Agenda Item: I

Council Announcements and Remarks

J. Adjournment:

To adjourn a meeting of City Council, a majority of the Council members must vote for a motion to adjourn.

- 1) Motion to adjourn