BURKE COUNTY
BOARD OF COMMISSIONERS
REGULAR MEETING
COMMISSIONERS' MEETING ROOM
110 N. GREEN STREET, ENTRANCE E
YOUTUBE: BURKECOUNTYNC
MONDAY, OCTOBER 19, 2026
6:00 P.M.

1. CALL TO ORDER

2. INVOCATION

Pastor Nicolas Wilson, Oak Ridge Baptist Church Connelly Springs

3. PLEDGE OF ALLEGIANCE

Ray Childers Pirates, Age 8-9 Football Team and Cheerleaders

4. APPROVAL OF AGENDA

5. APPROVAL OF MEETING MINUTES

1. BOC - Approval of Meeting Minutes
   Presented by **Jeffrey C. Brittain, Chairman**

6. PRESENTATIONS

1. CM - Recognition for 2026 Fall Citizens Academy
   Presented by **Brian Epley, County Manager**

2. BCCOC- Proclamation declaring October 21, 2026 National Chamber of Commerce Day
   Presented by **Tonia Stephenson, BCCOC President/CEO**

7. SCHEDULED PUBLIC HEARINGS

1. C-PACE- Public Hearing and Consideration of C-PACE Program Participation
   Presented by **Kristin Bunn, C-PACE Program Administrator**

2. CD- ZMA 2026-04, 2763 US 64 Morganton, NC- Zoning Map Amendment & Public Hearing
   Presented by Patrick Dickinson, Planner

3. CD- ZMA 2026-05, 7857 Old NC HWY 10, Hickory, NC- Zoning Map Amendment & Public Hearing
   Presented by **Patrick Dickinson, Planner**

4. CM - Resolution of Support for Piedmont Affordable Senior Housing Foundation

& The Berkeley
Presented by **Dr. Lindsay Duch, Vice President, Health Policy ALG Senior**

5. CM - Clover Ridge Subdivision Development Agreement and MOU
Presented by **Brian Epley, County Manager**

6. Finance - Community Development Block Grant for Infrastructure Improvements
Presented by **Brian Epley, County Manager**

8. INFORMAL PUBLIC COMMENTS

Each speaker is limited to three (3) minutes. To participate, please pre-register by emailing the Clerk prior to the meeting or sign-in with the Clerk at the meeting.

9. CONSENT AGENDA- Present by Brian Epley, County Manager

Items on the consent agenda are noncontroversial and routine. Prior to the adoption of the meeting agenda, any request by a board member to remove an item from the consent agenda requires a majority vote of the board. All remaining consent agenda items shall be considered and adopted by a single motion.

1. CM - Proposed Updates to WPCOG Charter and Bylaws

2. CM- Budget Amendment No. 8- Capital Project Closeout

3. CM - Budget Amendment No. 9- Additional State Funding for Adult Services Clients Impacted by Hurricane Helene

4. CM - Budget Amendment No. 10 — Sheriff Office Grants

5. Clerk - Appointment to LEPC Advisory Board

6. Clerk - Appointment to JCPC Advisory Board

7. Tax - Tax Release and Refund Report for Period Ending September 30, 2026 -

8. Tax - Tax Collection Report for Period Ending September 30, 2026

10. ITEMS FOR DECISION

1. FM - Approval of Burke County for the Issuance of Tax-Exempt Debt Obligations by Oak Hill Fire and Rescue Protection Association, Inc
Presented by **Chief Jimmy Winters, Oak Hill Fire and Rescue Protection Association, Inc.**

2. FM - Approval of Burke County for the Issuance of Tax-Exempt Debt Obligations by Lake James Fire and Rescue, Inc.
Presented by **Ken Corn, Treasurer, Lake James Fire and Rescue, Inc.**

3. TA - Approval of 2027 Schedule of Value and Present Use Schedule of Value -

Presented by **Travis Isaacs, Tax Administrator**

11. REPORTS AND COMMENTS

1. BOC - Reports and Comments - Presented by **Jeffrey C. Brittain, Chairman**

12. VACANCY ANNOUNCEMENTS

1. Clerk - Boards & Committees Vacancy Report
   Presented by **Morgan Buchanan, Clerk to the Board**

13. CLOSED SESSION

14. ADJOURN

In accordance with ADA regulations, persons in need of an accommodation to participate in the meeting should notify the County Manager's office at 828-764-9350 at least forty-eight (48) hours prior to the meeting.

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

APPROVAL OF MEETING MINUTES

Subject Title: **BOC - Approval of Meeting Minutes**

Presented by: **Jeffrey C. Brittain, Chairman**

Summary of Information: The draft minutes for the following meetings are attached for approval:
September 21st, 2026 Regular Meeting
October 5th, 2026 Pre-Agenda Meeting

Strategic Plan Focus Area Alignment:
Not Applicable

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To approve the following meeting minutes as presented: September 21st 2026 Regular Meeting and October 5th 2026 Pre-Agenda Meeting.

MINUTES
BURKE COUNTY BOARD OF COMMISSIONERS
REGULAR MEETING

The Burke County Board of Commissioners held a regular meeting on Monday, September 21, 2026, at 6:00 p.m. in the Commissioners' Meeting Room, Burke County Services Building, 110 N. Green Street, Entrance E, in Morganton, North Carolina. The meeting was streamed live on the County's YouTube channel, BurkeCountyNC, and it was broadcast on the local cable systems. The agenda, in its entirety, was posted to the County's website, www.burkenc.org, several days prior to the meeting. Pursuant to Resolution No. 2024-17, adopted and effective on August 20, 2024, the Burke County Board of Commissioners conferred upon itself all the power, duties, and responsibilities of the Board of Health and the Social Services Board. Those present were:

COMMISSIONERS:	Jeffrey C. Brittain, Chairman Phil Smith, Vice Chairman Brian Barrier Randy Burns Mike Stroud
STAFF:	Brian Epley, County Manager William "Will" Sparks, Wilson, Lackey, Rohr & Hall P.C. (County Attorney Designee) Morgan Buchanan, Clerk to the Board of Commissioners Ethan Bumgarner, Deputy Finance Director

CALL TO ORDER
Chairman Brittain called the meeting to order at 6:00 p.m.

INVOCATION
Rev. Dr. Brad Hinton, Pastor, First UMC-Valdese, delivered the invocation.

PLEDGE OF ALLEGIANCE
First UMC-Valdese Youth led the Pledge of Allegiance to the American Flag.



Depicted is the Board of Commissioners with the First UMC-Valdese Youth.

APPROVAL OF AGENDA

Motion: To approve the agenda as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Brian Barrier, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

APPROVAL OF MEETING MINUTES

Motion: To approve the minutes of the August 6, 2026 (special) and September 8, 2026 (pre-agenda) meetings as written.

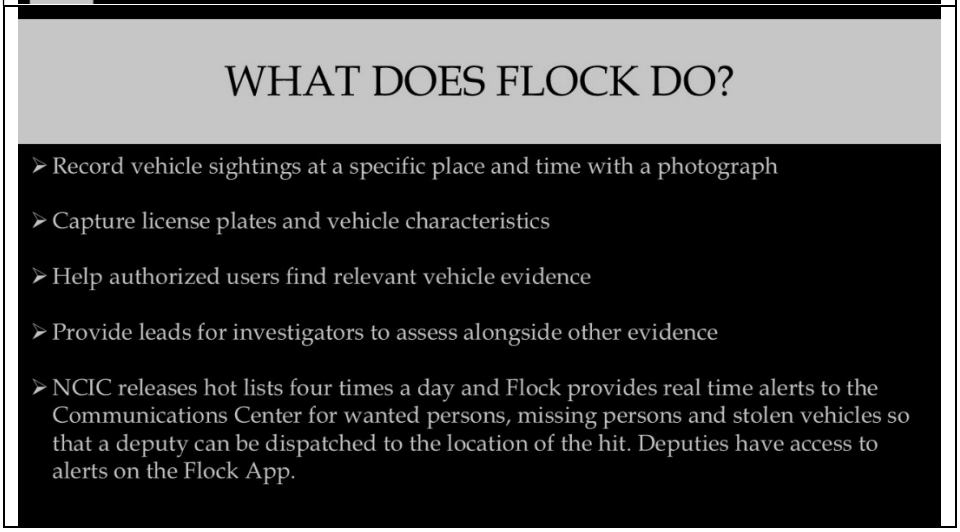
RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

PRESENTATIONS

BCSO - BURKE COUNTY SHERIFF'S DEPARTMENT UPDATES

Sheriff Banks Hinceman presented a departmental update as follows:





WHAT FLOCK DOES NOT DO

- Flock does not identify people by their faces (facial recognition)
- Flock does not identify who is inside a vehicle
- Flock does not continuously track people, vehicles or cell phones
- Flock does not replace investigators or human judgment
- Flock customers cannot access a live video feed from an ALPR camera
- Flock is not used for red light and/or speed enforcement
- Flock does not connect to Department of Motor Vehicles (vehicle registration and driver's license information) or Division of Criminal Information (criminal history and personal information) records

USE OF FLOCK

- Law enforcement purpose - any of the following:
  1. Actions related to criminal investigations and arrests
  2. Apprehending an individual with an outstanding felony warrant(s).
  3. Locating a missing or endangered person.
  4. Locating a lost or stolen vehicle.

POLICY – DUE DILIGENCE

The Deputy must use due diligence to independently verify the information provided by Flock to ensure its accuracy before taking any law enforcement action.

PROHIBITED USE OF FLOCK

- Invasion of Privacy
- Harassment or Intimidation
- Use Based on a Protected Characteristic (race, gender, religion, political affiliation, nationality, ethnicity, sexual orientation or disability)
- Personal Use
- Infringement of First Amendment Rights

❖ Anyone who engages in an impermissible use of the ALPR (I.E. FLOCK) system or associated scan files, or hot lists will be subject to disciplinary action up to and may include termination.

DISCLOSURE OF RECORDS

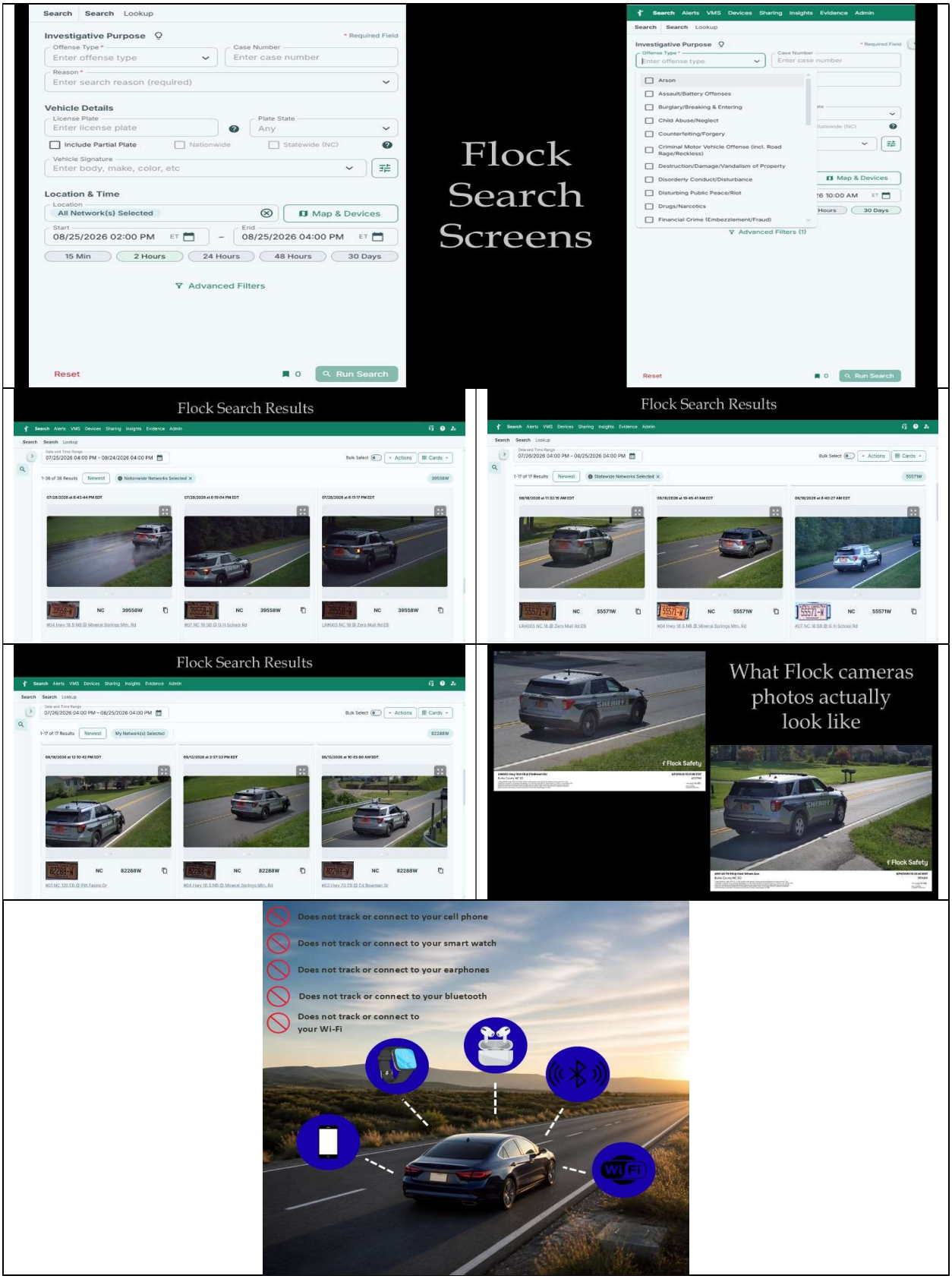
- Captured plate data is confidential and not a public record. Data shall not be disclosed except to a criminal justice officer at a State or local law enforcement agency or a similar official at a federal law enforcement agency for a legitimate law enforcement purpose. Data will not be sold, accessed or used for any purpose other than legitimate law enforcement or public safety purposes.

INTERNAL DATA SECURITY AND ACCESS

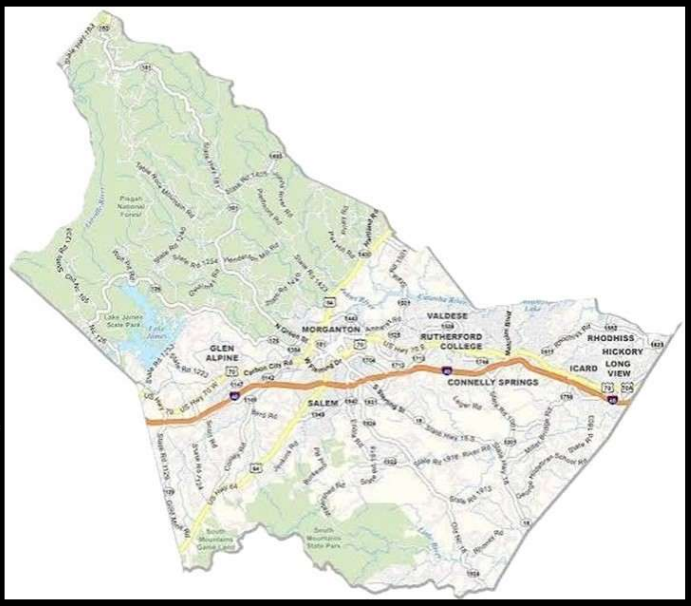
- All ALPR (I.E. FLOCK) data will be accessed through a system capable of documenting all information viewed, including the user's name, date and time of access.
- Every ALPR (I.E. FLOCK) search must be documented by either the associated agency case number or incident number, and/or a reason for the inquiry.
- Only trained agency members will be allowed access to the ALPR (I.E. FLOCK) system.
- Retention of data is 30 days.

DATA DETECTION BROWSING AUDITS

- It is the responsibility of the Sheriff's designee to ensure that an audit is conducted of ALPR (I.E. FLOCK) detection browsing inquiries at least once per month. The Sheriff's designee is the Major who is responsible for all internal investigations.
- The audit shall be documented in the form of an internal agency memorandum directed to the Sheriff.
- The audit will take place once a month.


Search
Search
Lookup
Investigative Purpose
Offense Type
Enter offense type
Case Number
Enter case number
Reason
Enter search reason (required)
Vehicle Details
License Plate
Enter license plate
Plate State
Any
Include Partial Plate
Nationwide
Statewide (NC)
Vehicle Signature
Enter body, make, color, etc
Location & Time
Location
All Network(s) Selected
Map & Devices
Start
08/25/2026 02:00 PM ET
End
08/25/2026 04:00 PM ET
15 Min
2 Hours
24 Hours
48 Hours
30 Days
Advanced Filters
Reset
0
Run Search
Flock Search Screens
Arson
Assault/Battery Offenses
Burglary/Breaking & Entering
Child Abuse/Neglect
Counterfeiting/Forgery
Criminal Motor Vehicle Offense (incl. Road Rage/Reckless)
Destruction/Damage/Vandalism of Property
Disorderly Conduct/Disturbance
Disturbing Public Peace/Riot
Drugs/Narcotics
Financial Crime (Embezzlement/Fraud)
Advanced Filters (1)
Flock Search Results
Flock Search Results
Flock Search Results
What Flock cameras photos actually look like
Flock Safety
Does not track or connect to your cell phone
Does not track or connect to your smart watch
Does not track or connect to your earphones
Does not track or connect to your bluetooth
Does not track or connect to your Wi-Fi
WiFi

- For the 10 Flock cameras placed throughout Burke County, this provides coverage across approximately 511 square miles. Burke County encompasses a total of 1,703.14 miles of public streets and highways.
- The cost of the Flock cameras was $38,963.75 during the first year, which included a one-time implementation fee. The second year, the annual cost is $32,025.00.
- To date, Flock provided investigative leads that allowed us to seize $587,000 in illegal narcotics and recovered $156,000 in stolen vehicles.
- The type of cameras we have are the Flock Safety Falcon and they do not have the capability of video.



MORE INFORMATION

For more information, please visit the Flock website:

flocksafety.com

Chairman Brittain opened the floor for questions or comments. Commissioner Barrier asked how long records of searches or inquiries conducted by Sheriff's Office personnel through the Flock system are retained. Sheriff Hinceman stated that the data was retained for 30 days and explained that the system includes auditing tools designed to identify potentially excessive or unusual searches. He said Flock had recently introduced an audit-assistance feature that can flag activity, such as a license plate being searched an unusually high number of times, for agency review. Sheriff Hinceman reported that Major Norman reviews system activity and samples searches conducted by personnel. Will Baker, Flock Safety representative, clarified that while certain Flock data is subject to a 30-day retention period, records of searches conducted within the system are retained for a substantially longer period of time. He explained that the longer retention of search history allows an agency to look back over a period of years to determine whether the platform has been misused.

Commissioner Barrier inquired where a citizen concerned about searches involving a license plate would direct a public records request. Mr. Baker stated that the data is owned by the Sheriff's Office and that a request for such records would therefore be directed to the Sheriff's Office rather than Flock. Commissioner Stroud expressed appreciation for the Sheriff's Office and the use of technology to promote community safety, while acknowledging privacy considerations. Sheriff Hinceman stated that Flock has been a useful law-enforcement tool but that he understands concerns about the technology. He said he does not interpret those concerns as opposition to law enforcement and has spoken with numerous community members who have questions or concerns regarding its use.

Commissioner Burns asked whether Flock cameras operate similarly to cameras used for toll-road billing. Mr. Baker explained that the underlying license plate imaging technology may be similar, but Flock does not provide the Sheriff's Office with vehicle-owner information through the camera system and is not used for toll collection, red light enforcement, speeding citations, or similar automated enforcement. Further, he explained that a person would not receive a citation based solely upon an image captured by a Flock camera.

Commissioner Burns then raised a hypothetical situation in which a vehicle is associated with a serious crime but is being driven by someone other than its owner, asking how the owner might be treated if the vehicle generated a Flock alert. Sheriff Hinceman explained that the issue would not be unique to Flock. In the example of a vehicle associated with an armed bank robbery, law enforcement would also disseminate a BOLO containing the vehicle description and license plate information to officers through their mobile data terminals. If a vehicle matching a BOLO associated with a serious and potentially armed offense were located, officers would approach the stop with heightened caution for officer safety.

Commissioner Burns discussed the balance between privacy concerns and the potential public-safety benefits of the technology, noting circumstances in which such a tool could assist in locating a missing family member. He stated that he continued to have questions about the technology but believed there were meaningful public-safety benefits and emphasized the importance of maintaining appropriate safeguards and ensuring the technology remains limited to its intended law enforcement purpose.

Sheriff Hinceman noted that Flock is not the only company providing license plate recognition technology and that other companies offer similar or broader capabilities. In response to Commissioner Burns, he also confirmed that a private business in Burke County operates two (2) Flock cameras on its property. The Sheriff's Office does not share its data with the company; however, the company provides law enforcement access to its camera information, which Sheriff Hinceman indicated has been particularly useful to municipal law enforcement in connection with thefts occurring at or around the business.

Commissioner Burns asked the Sheriff to remain vigilant in ensuring the technology is used appropriately. Sheriff Hinceman responded by discussing his prior responsibility for internal affairs while serving as Chief Deputy. He stated that during approximately 16 years in that role, he investigated employees with whom he had longstanding professional and personal relationships, with some investigations resulting in dismissal and others being referred to the State Bureau of Investigation for potential criminal charges. He emphasized the importance of accountability and ensuring that Sheriff's Office personnel act appropriately.

Motion: To accept the report as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

NCEIPD- NATIONAL DISABILITY EMPLOYMENT AWARENESS MONTH

Shelley Cash, Business Relations Representative, Division of Employment and Independence for People with Disabilities (EIPD) from NC DHHS, introduced her colleagues, Janet Hannah, Business Relations Representative, Grace Rizzitano, Business Relations Representative, and Santia Parks, Unit Manager. She then engaged in a disability-themed trivia game with the Board. Afterwards, she presented the following:



Ms. Cash requested approval of a proclamation that recognizes October as National Disability Employment Awareness Month and highlights the many contributions that people with disabilities, including those with mental health conditions and other nonobvious disabilities, make to America's workplaces and economy. The proclamation formally designates October for this observance with this year's theme, "Celebrating Value and Talent."

Chairman Brittain opened the floor for questions or comments. Ms. Cash responded to a couple of clarifying questions from the Board. There being no further discussion, Chairman Brittain called for a motion.



Depicted from left to right (front row): Santia Parks, Shelley Cash, Janet Hannah, and Grace Rizzitano.
Depicted from left to right (back row): Commissioner Stroud, County Manager Epley, Commissioner Burns, Chairman Brittain, Commissioner Barrier, and Vice Chairman Smith.

Motion: To approve Proc. No. 2026-12 declaring October as National Disability Employment Awareness Month.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Randy Burns, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

Proclamation No. 2026-12 reads as follows:

BURKE COUNTY
NORTH CAROLINA

PROCLAMATION RECOGNIZING
NATIONAL DISABILITY EMPLOYMENT AWARENESS MONTH
OCTOBER 2026

WHEREAS, October 2026 marks the 81st anniversary of National Disability Employment Awareness Month, an annual observance recognizing the contributions of workers with disabilities and promoting inclusive employment practices; and

WHEREAS, National Disability Employment Awareness Month traces its history to 1945, when Congress established a weeklong observance recognizing people with physical disabilities, and

it has since expanded to include individuals with all types of disabilities, including mental health conditions and other nonobvious disabilities; and

WHEREAS, the 2026 theme, “Celebrating Value and Talent,” recognizes the skills, perspectives, and contributions that workers with disabilities bring to workplaces, communities, and the nation’s economy; and

WHEREAS, workplaces that welcome and support the talents of all people strengthen businesses, expand economic opportunity, and help build a more inclusive and prosperous community; and

WHEREAS, National Disability Employment Awareness Month provides an opportunity for employers, schools, and community organizations to recognize the value of inclusive employment and to help ensure that individuals with disabilities have access to meaningful work, economic self-sufficiency, and full participation in community life; and

WHEREAS, Burke County affirms the importance of equal employment opportunity and recognizes the valuable contributions individuals with disabilities make throughout our workplaces and community.

NOW, THEREFORE, BE IT PROCLAIMED, that the Burke County Board of Commissioners hereby recognizes October 2026 as National Disability Employment Awareness Month in Burke County and calls upon employers, schools, community organizations, and residents to participate in this observance and support efforts that expand meaningful employment opportunities for individuals with disabilities throughout the year.

Approved this 21st day of September 2026.

/s/: Jeffrey C. Brittain
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

MORGANTON DAV - MORGANTON DISABLED AMERICAN VETERANS CHAPTER 43

Laura Meadows, Certified Service Officer and First Junior Vice Commander of Morganton Disabled American Veterans (DAV) Chapter 43, provided an overview of DAV’s mission and the services available to veterans and their families. She stated that DAV has served veterans for more than 100 years and assists more than one million veterans annually with benefit claims, employment and entrepreneurship opportunities, scholarships, health care access, and advocacy.

Ms. Meadows explained that Chapter 43 was chartered in 1956 and currently has more than 500 members, including auxiliary members. The Chapter’s volunteer service officers assist veterans and their families with VA benefit claims at no cost and provide free transportation to VA medical appointments.

Ms. Meadows also highlighted the Chapter’s newly established women veterans group, the first of its kind in Burke County, which provides opportunities for fellowship, mutual support, and addressing the unique needs of women veterans. She invited veterans, their families, and friends of veterans to visit the Chapter and learn more about its services and programs.

Chairman Brittain opened the floor for questions or comments. Commissioner Burns expressed

gratitude for her service. There being nothing further, Chairman Brittain called for a motion.

Motion: To accept the presentation as given.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Phil Smith, Vice Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

AMERICA 250 - TIME CAPSULE PRESENTATION

Ed Phillips, CEO of Discover Burke and Chairman of the America 250 NC Committee, presented the Burke County 2026 Time Capsule. Mr. Phillips recognized America 250 Committee members Lori Johnson, Dr. Joel Welch, Dr. Bryant Lindsay, and Commissioner Stroud, as well as Register of Deeds Stephanie Norman, for her involvement with the project.

Mr. Phillips explained that the time capsule serves as a cornerstone project of Burke County's commemoration of the 250th anniversary of the signing of the Declaration of Independence. The capsule is intended to preserve an authentic snapshot of life in Burke County in 2026 and will remain sealed for 50 years before being opened in 2076 during the observance of the 300th anniversary of American independence.

Mr. Phillips reported that approximately 110 items had been identified for inclusion in the capsule, including letters and written documents; newspapers and publications reflecting current events, businesses, sports, prices, and community life; demographic and economic information documenting population, employment, income, and housing; photographs and community materials; and everyday objects representing current technology, culture, and daily life. Materials representing local schools, businesses, government, civic organizations, and communities will also be included. Mr. Phillips emphasized the involvement of Burke County students, whose contributions will provide future generations with the perspectives of young people living during the America 250 commemoration.

Mr. Phillips described the project as more than a collection of memorabilia, explaining that it is intended to create a connection across generations and preserve a record of who Burke County residents were, how they lived, what they valued, and their hopes for the community's future. He thanked the Board of Commissioners and the individuals and organizations that contributed to the project.

Mr. Phillips stated that the time capsule was constructed by faculty and students of Western Piedmont Community College through its woodworking and welding programs. Mr. Phillips announced that a dedication ceremony would be held October 2, 2026, at 11:00 a.m. at the Register of Deeds Office. The capsule will be filled and sealed on site and displayed in the Register of Deeds lobby for the next 50 years. There being nothing further, Chairman Brittain called for a motion.

Motion: To accept the presentation as given.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Brian Barrier, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud



The Board of Commissioners and County Manager Epley pose with the America 250 NC Committee members and the time capsule.

TAX - 2027 REVALUATION: REAPPRAISAL AND SCHEDULE OF VALUES UPDATE

Travis Isaacs, Tax Administrator, presented the 2027 revaluation update as follows:



What Is the Schedule of Values (SOV)?

In plain terms:

The Schedule of Values, Standards, and Rules (SOV) is the manual the Assessor's Office uses to appraise every property in the county the same way. It sets the rates, tables, and procedures for valuing land, homes, farms, and businesses — so two similar properties are valued consistently, whoever appraises them.



Required by N.C.G.S. 105-317 before every revaluation

It covers:

- Land value & neighborhood tables
- Building cost & depreciation schedules
- Present-use value rates for farmland
- Rules for special properties (income, commercial)

Who Is Doing the 2027 Revaluation?

Burke County's 2027 revaluation is being conducted entirely in-house by the County's own Tax Office — no outside vendor contract required.



Our Team

4 licensed real property appraisers plus 1 data analysis team member — all Burke County staff



Local Knowledge/Task Force Committee

Our appraisers know Burke County's neighborhoods and sales activity firsthand — no learning curve required



Scope of Work

Field data collection, appraisal, appeals support, and delivery of final values — for all 60,000 parcels, start to finish

What Outside Vendors Charge NC Counties

Pender County	$44 per parcel • $2.3M contract for ≈50,000 parcels (Vincent Valuations, 2023)
Alamance County	≈$32 per parcel • ≈$2.57M contract for ≈80,000 parcels (Vincent Valuations, 2027 revaluation)
NC Statewide Average	$18.46 per parcel — average revaluation budget, 2008 and later (UNC School of Government)
If Burke Outsourced	60,000 parcels × recent NC contract rates ≈ $1.9M – $2.6M for a one-time vendor contract
Burke's Actual Approach	**In-house team, already on staff — no added contract cost to taxpayers**

Sources: Pender County and Alamance County board-approved reappraisal contracts (2023, 2025); UNC School of Government, A Citizens' Guide to the Revaluation and Assessment of Real Property in North Carolina.

A Cost Saver for Burke County Taxpayers

Completing the revaluation in-house is projected to save Burke County taxpayers an estimated $1.9M – $2.6M compared to hiring an outside firm.

Our Team

4 licensed real property appraisers plus 1 data analysis team member — all Burke County staff

What a Vendor Would Cost

60,000 parcels × recent NC vendor rates ($32–$44/parcel) ≈ $1.9M–$2.6M, one time

Net Savings

No new contract awarded — the same scope of work, completed with existing, already-budgeted staff

How the 2027 Schedule of Values Is Completed and Used in 5 Phases

1 Field Data Collection → 2 Sales & Market Analysis → 3 Building the Schedule of Values → 4 Applying Values & Quality Review → 5 Delivery & Appeals Support

Burke County's in-house appraisal team manages each phase of the reappraisal, from the first property visit to the final values delivered to the Board. The next few slides walk through what happens at each stage.

Phase 1: Field Data Collection

What gets collected:

- Property characteristics — size, age, condition, construction quality
- On-site measurements and verification for commercial and residential properties
- Building permit records and aerial photo review for residential properties
- Confirmation of any additions, renovations, or changes since the last revaluation

Field data collection completed Spring 2026

Phase 2: Sales & Market Analysis

1 Verified Sales

Recent, arms-length property sales across the county are confirmed and screened to ensure they reflect true market transactions.

2 Neighborhood Delineation

Properties are grouped into market areas — neighborhoods — where values tend to move together.

3 Ratio Studies

Sale prices are compared to current assessed values to measure how closely values track the market.

4 Time & Trend Adjustments

Sales are adjusted to a common valuation date so seasonal or year-over-year market shifts don't skew results.

SALES RATIO STUDY · 2023 SOV, TRENDED TO 2026

Vacant Land

Bldg + Misc Improvement = 0 · 1,252 sales

Vacant Land — Median Sales Ratio by Year

Bldg + Misc Improvement = 0 · 2023 SOV, trended to 2026

Township	SR 2023	SR 2024	SR 2025	SR 2026
Drexel	0.964	0.932	0.965	1.084
Icard	0.886	0.897	0.811	0.736
Jonas Ridge	0.859	0.950	0.726	0.666
Linville	0.794	0.760	0.736	0.724
Lovelady	0.933	1.030	0.882	0.915
Lower Creek	0.876	0.677	0.609	0.513
Lower Fork	0.773	0.742	0.624	0.933

Township	SR 2023	SR 2024	SR 2025	SR 2026
Morganton	0.911	0.935	0.960	0.699
Quaker Meadows	0.713	0.940	0.739	0.639
Silvercreek	0.963	0.745	0.570	0.739
Smokey Creek	0.755	0.770	0.653	0.928
Upper Creek	1.092	0.634	0.466	—
Upper Fork	0.990	0.769	0.655	0.730

Vacant Land — Sale Ratio & Trended SR (to 2026)

Bldg + Misc Improvement = 0 · Sales ratio untrended 2026

Township	Sale Ratio	Trended SR	# of Sales
Drexel	0.99	1.08	46
Lower Fork	0.71	0.93	91
Smokey Creek	0.75	0.93	23
Lovelady	0.94	0.92	220
Silvercreek	0.75	0.74	127
Icard	0.87	0.74	331
Upper Fork	0.77	0.73	25

Township	Sale Ratio	Trended SR	# of Sales
Linville	0.77	0.72	94
Morganton	0.91	0.70	144
Jonas Ridge	0.83	0.67	20
Quaker Meadows	0.76	0.64	62
Lower Creek	0.64	0.51	53
Upper Creek	0.78	—	16

SALES RATIO STUDY · 2023 SOV, TRENDED TO 2026

All Sales

Improved + Vacant combined · 4,641 sales

All Sales — Median Sales Ratio by Year

Improved + Vacant combined · 2023 SOV, trended to 2026

Township	SR 2023	SR 2024	SR 2025	SR 2026
Drexel	0.827	0.821	0.778	0.807
Icard	0.849	0.774	0.747	0.723
Jonas Ridge	0.821	0.749	0.750	0.745
Linville	0.783	0.752	0.730	0.726
Lovelady	0.851	0.808	0.787	0.805
Lower Creek	0.820	0.692	0.640	0.697
Lower Fork	0.823	0.688	0.673	0.778

Township	SR 2023	SR 2024	SR 2025	SR 2026
Morganton	0.839	0.757	0.762	0.780
Quaker Meadows	0.870	0.785	0.746	0.770
Silvercreek	0.831	0.704	0.713	0.758
Smokey Creek	0.763	0.842	0.733	0.729
Upper Creek	0.745	0.798	0.629	0.764
Upper Fork	0.785	0.619	0.763	0.684

All Sales — Sale Ratio & Trended SR (to 2026)

Improved + Vacant combined · 2023 SOV, untrended to 2026

Township	Sale Ratio	Trended SR	# of Sales
Drexel	0.81	0.81	295
Lovelady	0.81	0.80	589
Morganton	0.79	0.78	1040
Lower Fork	0.74	0.78	241
Quaker Meadows	0.79	0.77	338
Upper Creek	0.73	0.76	64
Silvercreek	0.74	0.76	487

Township	Sale Ratio	Trended SR	# of Sales
Jonas Ridge	0.78	0.74	77
Smokey Creek	0.76	0.73	46
Linville	0.75	0.73	232
Icard	0.78	0.72	1001
Lower Creek	0.70	0.70	147
Upper Fork	0.73	0.68	84

Phase 3: Building the Schedule of Values

Market data from Phases 1 and 2 is translated into the standardized rates and tables that make up the Schedule of Values — the same manual every appraiser uses to keep values consistent countywide.

Land Value Tables

Built from vacant land sales and neighborhood analysis to set per-acre or per-lot land rates.

Cost & Depreciation Schedules

Replacement cost tables for buildings, adjusted for age and condition to reflect current construction costs.

Income Models

For commercial and income-producing properties, rental income and expense data support value estimates.

Phase 4–5: Applying Values & Quality Review

The Schedule of Values is applied to every parcel, then tested for accuracy before anything is finalized.

Model Application

The Schedule of Values is applied consistently to every property using the County's CAMA system.

Statistical Testing

Sales-ratio studies, Coefficient of Dispersion, and Price-Related Differential confirm values are accurate and uniform.

Notice of Value Mailing

Once final values are confirmed, Notices of Value are mailed to every property owner — expected February 2027.

Appeals Support

Burke County's Tax Office supports the informal review and appeals process once notices are mailed to owners.

The Legal Process (N.C.G.S. § 105-317)

October 19, 2026

1. Proposed SOV is Prepared →
2. Submitted to the Board of Commissioners →
3. Filed for public inspection →
4. Public hearing held →
5. Board adopts final SOV →
6. Notice of adoption published

The Assessor must submit the proposed SOV at least 21 days before this hearing. After adoption, the Board's Order must be published for four consecutive weeks, with the last publication at least 7 days before the deadline to appeal the Schedule's validity.

Key Dates for the 2027 Schedule of Values

Oct 19, 2026	Schedules delivered to the Board (N.C.G.S. 105-317)
Oct 20, 2026	Notice of Public Hearing published
Nov 16, 2026	Public hearing on proposed Schedules & Adoption
Nov 17, 2026	Notice of adoption published (4 consecutive weeks
Nov 18-Dec 16, 2026	Notice of Adoption published (4 consecutive weeks)
Dec 16, 2026	Last day to challenge the Schedule's validity (NC Property Tax Commission)

Thank You

Questions & Comments Welcome

Burke County Tax Department

200 Avery Avenue, Morganton, NC 28655

828-764-9430 • [redacted]

https://www.burkenc.org/1199/Real-Estate

Chairman Brittain opened the floor for questions or comments. Commissioner Barrier questioned why Burke County conducts property tax revaluations on a four (4) year cycle when State law allows a longer period between revaluations unless assessment-to-sales ratios trigger an earlier revaluation. He noted that conducting a revaluation carries a cost to the County and questioned the benefit of incurring that expense every four (4) years when the Board ultimately establishes the tax rate based on the revenue needed. He asked whether the County could instead wait until a revaluation is required by the State or until the maximum statutory interval is reached.

Mr. Isaacs explained that a shorter revaluation cycle helps prevent assessed values from becoming significantly disconnected from the real estate market. During periods of rapid market growth, waiting several additional years can result in much larger changes in assessed values when the next revaluation occurs. He cited another county that went approximately seven (7) years between revaluations and subsequently experienced property value increases ranging from approximately 120% to 200%. Commissioner Barrier questioned whether the State's assessment-to-sales ratio requirements would have triggered an earlier revaluation under those circumstances, and Mr. Isaacs confirmed that they could. He noted that Burke County received a letter in 2025 requiring the County to conduct a revaluation within the following three (3) years and, because the County was already on a four (4) year cycle, proceeded with its scheduled revaluation.

Commissioner Burns emphasized that revaluation is required by State law and noted that its effect varies among individual property owners. He recalled that during the previous revaluation, some properties increased significantly in value, while others remained relatively unchanged or decreased. Commissioner Burns stated that he intends to support a revenue-neutral tax rate following the upcoming revaluation and requested clarification regarding how a revenue-neutral rate affects individual taxpayers.

Mr. Isaacs explained that a revenue-neutral tax rate does not mean that every property owner's tax bill will remain the same or decrease. Individual results will vary depending on how each property's assessed value changes relative to the tax base as a whole. He noted that many properties around Lake James, Rhodhiss Lake, and Lake Hickory have appreciated significantly, while some vacant land in Drexel is currently selling below its 2023 assessed value. Accordingly, individual assessed values and resulting tax bills may increase, decrease, or remain relatively stable. Mr. Isaacs reiterated that properties will be revalued at 100% of market value and that a revenue-neutral tax rate does not guarantee a lower tax bill for an individual property owner.

There being no further discussion, Chairman Brittain called for a motion.

Motion: To accept the presentation regarding Burke County's Real Property Reappraisal and Schedule of Values as given.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

CM - END OF THE YEAR REPORT

Brian Epley, County Manager, presented the End of Year Report for FY 25-26. The full report is hereby incorporated into the meeting minutes by reference, and the highlights of his presentation were as follows:



End of Year Report

September 2026

BURKECOUNTY

High Performance is Culture



- Culture is how we make decisions.
- Our Culture Is:
  - Purpose Focused & Value Driven
  - Teams Based
  - Performance & Data Driven
- Our Culture is Developed Through Investing In:
  - People
  - Physical Environment
  - Technology

BURKECOUNTY

IMPROVING LIVES IN BURKE COUNTY

SERVICE | SUPPORT | ENHANCEMENT

Empathy	Teamwork	Accountability	Performance	Growth
We treat all people with fairness, respect, and kindness; we encourage diverse perspectives.	We prioritize shared goals and believe we can achieve more when we work together.	We can communicate openly and honestly with employees and stakeholders. We have integrity to do what is right.	We are focused on innovation, efficiency, and measured outcomes. We strive for a high-quality customer experience.	We support and invest in the advancement of our team and prioritize professional development.

High Performance & Communication

- January……..Mid Fiscal Year Fiscal Report / Audit Report
- February/March……Work-Session & Report Analysis
- April……..Commissioner Revenue Memo
- May……..Budget Message / Capital Improvement Plan
- September……..End of Fiscal Year Report
- December……..Strategic Plan Update

Prioritizing Communication

FY 25-26 Performance Overview

Completion of EMS Base #1 & Headquarters	Completion of Animal Services Building	Completion Courthouse Renovation Project	HRC Renovation Project Kick Off & Design
Reduced Tax Rate	Reduced Environmental Health Turn-around Time from 12 weeks to 30 Days	In House Tax Revaluation Project	Public Safety Strategic Plan • Improved Law Enforcement Staffing Ratios • Reduced EMS & E-911 Response Times • Increased Commercial Fire Inspection Rates
Eliminated backlog of 300 DSS child welfare cases	Vertical Integration Foster Care Project	Launched BEAR Team Recovery echosystem expansion	Maintained Strong Human Capital Metrics

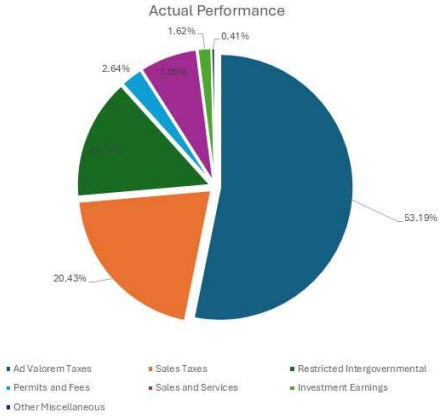
FY 25-26 Commissioner Strategic Plan

FOCUS AREA 4: FISCAL STEWARDSHIP

Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

1. Current Year Financial Performance
2. Debt Portfolio
3. Fund Balance & Key Ratios

FY 25-26 General Fund



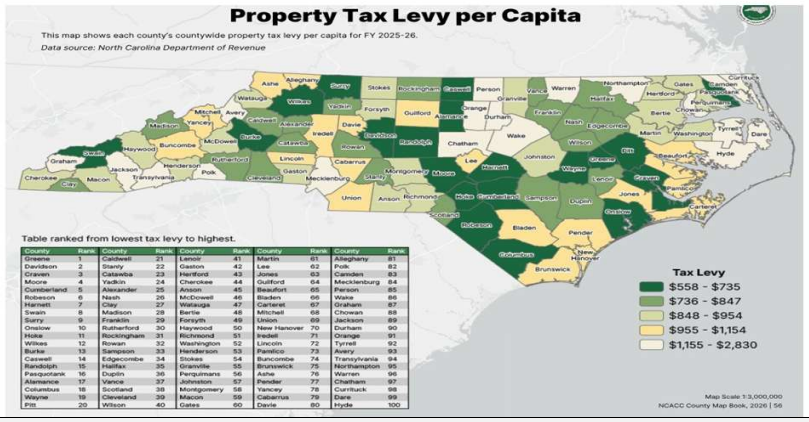
24-25 General Fund Revenue
$113,877,826

(+) .92%

25-26 General Fund Revenue
$114,920,468

FY 25-26 Performance Overview

Burke	$689	13th
Avery	$1,466	93rd
Alexander	$765	25th
Caldwell	$737	21st
Catawba	$753	23rd
Rutherford	$793	30th
Watauga	$864	47th



FY 25-26 Performance Overview

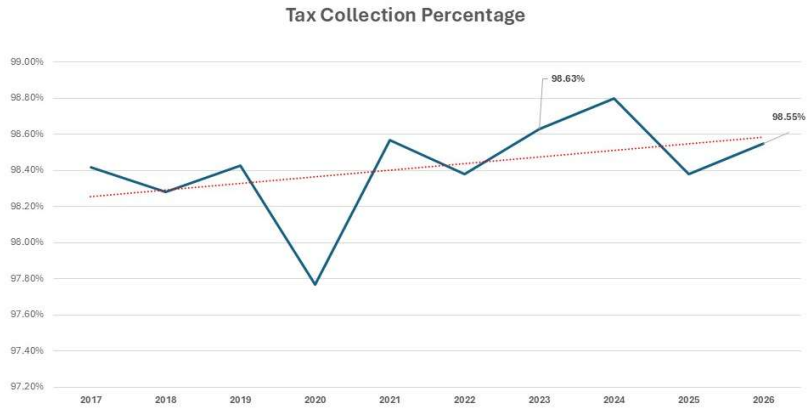
BURKE COUNTY, NORTH CAROLINA
Principal Property Tax Payers

Taxpayer	Type of Business	Assessed Valuation	Rank	Percentage of Total Vaulation
Duke Energy Corp	Utility	$ 234,787,781	1	2.06%
Continental Automotive Systems	Manufacturing	121,333,412	1	1.06%
Blue Ridge Healthcare Systems	Healthcare	89,853,273	1	0.79%
Leviton Manufacturing Co LLC	Manufacturing	63,578,366	1	0.56%
Rutherford Electric Membership Corp	Utility	49,395,002	1	0.43%
SGL Carbon LLC	Manufacturing	40,525,703	1	0.36%
Gerresheimer Glass, Inc.	Manufacturing	39,749,699	1	0.35%
Matrix Packaging	Manufacturing	38,784,429	1	0.34%
CCHU Morganton LLC	Real Estate	36,669,009	1	0.32%
RCG-MORGANTON PM, LLC	Manufacturing	36,552,211	1	0.32%
Totals		$ 751,228,885		6.59%

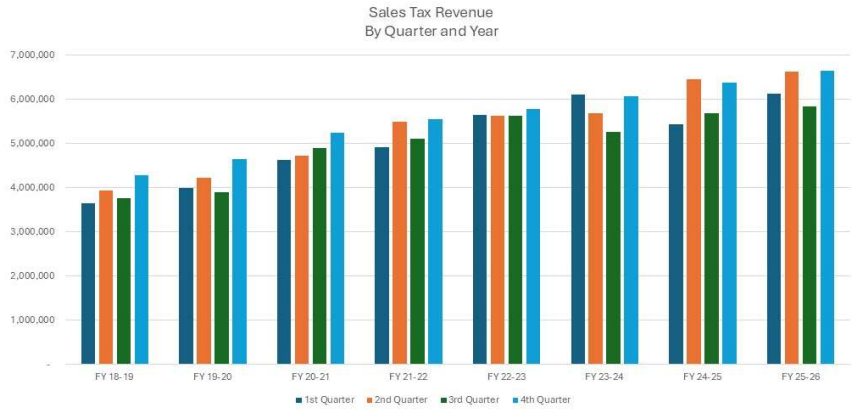
Source: Burke County Tax Department

Total Value……$ 751,228,885 (6.59%)
Total Revenue……$ 4,131,758 (3.65 Cents)
1 Penny = $1,130,509

FY 25-26 Performance Overview



FY 25-26 Performance Overview



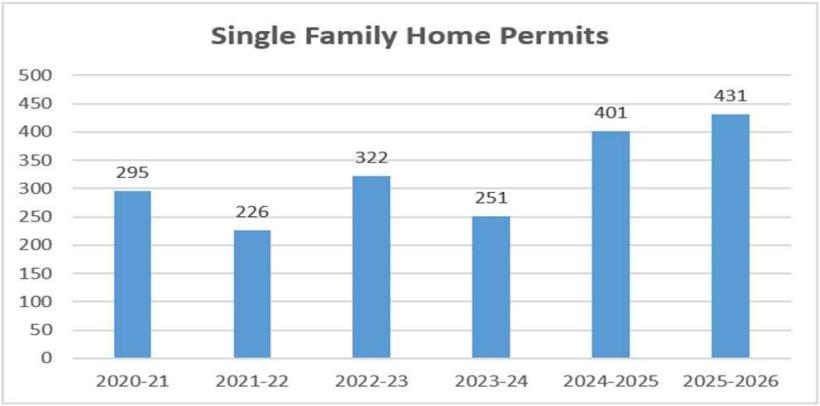
FY 25-26 Performance Overview



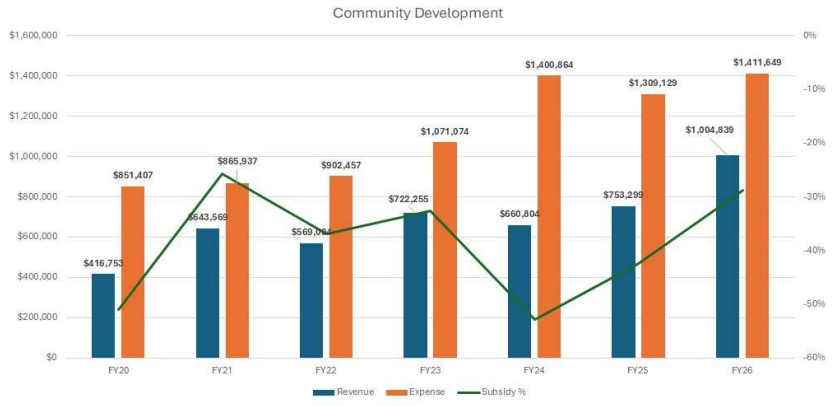
FY 25-26 Performance Overview



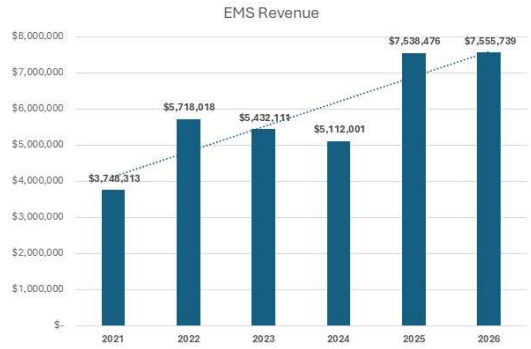
FY 25-26 Performance Overview

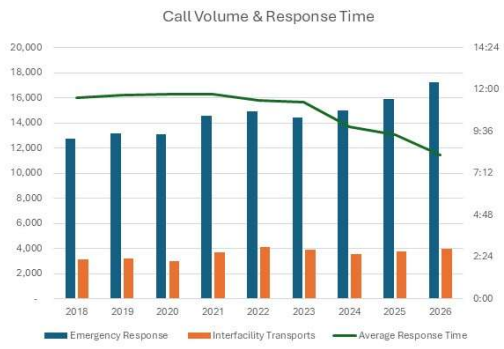


FY 25-26 Performance Overview



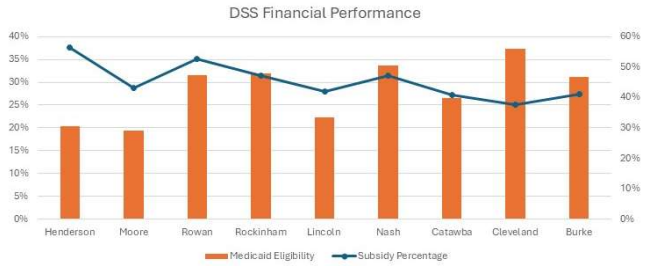
FY 25-26 Performance Overview



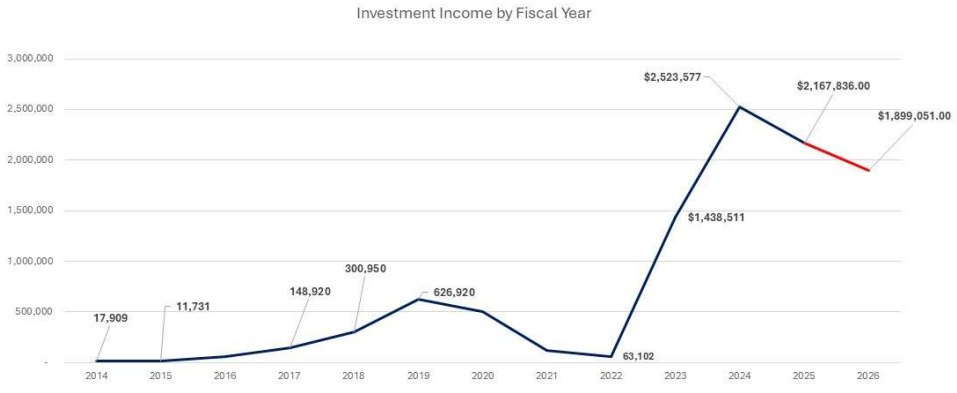


FY 25-26 Performance Overview

	2024-2025	2025-2026	$ Variance	% Variance
Total Revenue	$ 12,785,527	$ 14,947,889	$ 2,162,362	16.9%
Total Expense	$ 21,595,944	$ 23,822,973	$ 2,227,029	10.3%
Subsidy	$ (8,810,417.00)	$ (8,875,084.00)		
Subsidy %	-41%	-37%		



FY 25-26 Performance Overview

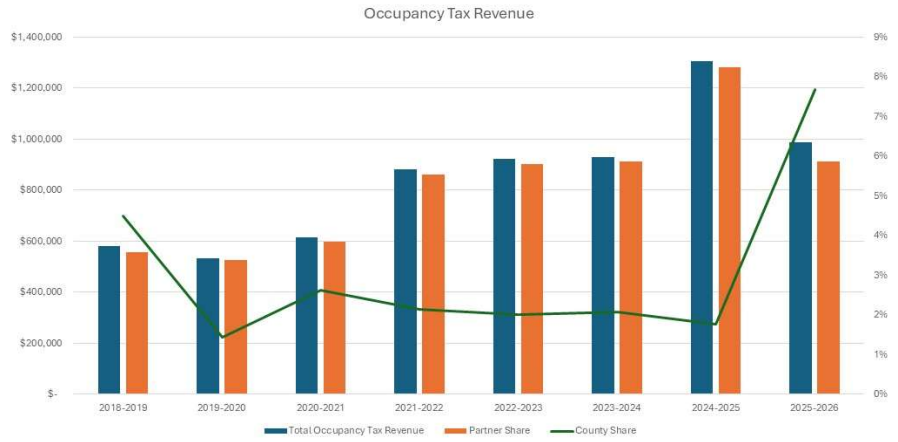


FY 25-26 Performance Overview

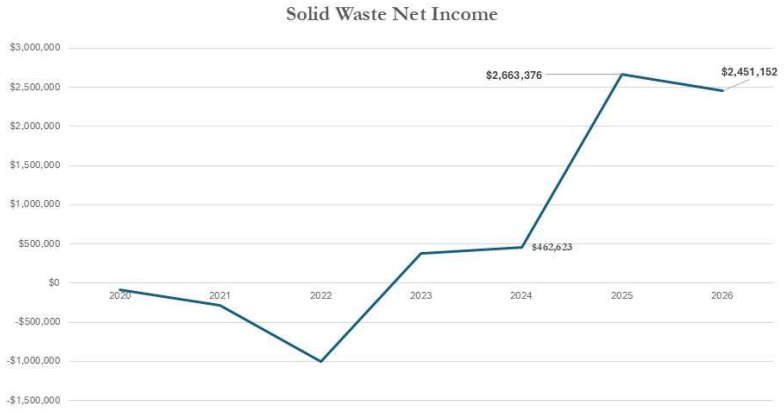
Current & Active Management

- 26 Active Grants
- $6.5M

FY 25-26 Performance Overview



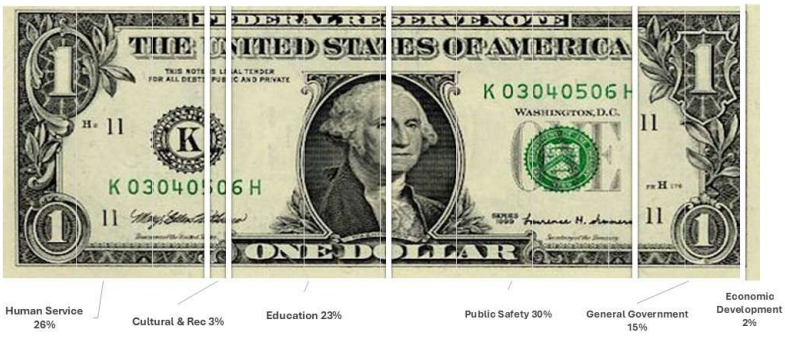
FY 25-26 Performance Overview



FY 25-26 Performance Overview



FY 25-26 Performance Overview



FY 25-26 Performance Overview

Department	FY 23	FY 24	FY 25	FY 26
Detention Center	$5,749,295	$6,430,034	$6,102,443	$6,505,862
Sheriff's Department	$8,334,000	$9,415,974	$11,150,569	$12,247,442
Emergency Medical Services / EM	$7,713,065	$8,639,608	$10,689,319	$9,949,515
Fire Marshal's Office	$428,075	$563,759	$639,275	$621,837
E-911/Communications	$2,625,355	$3,065,732	$3,131,803	$3,198,558
Total Public Safety	$24,849,790	$28,115,107	$31,713,409	$32,523,214

FY 25-26 Performance Overview



FY 25-26 Performance Overview



FY 25-26 Performance Overview

Experience Summary	2024-25	2025-26	Δ from Prior
Net Paid Claims	$6,411,426	$7,646,085	19.3%
Actual Net Cost	$7,775,878	$9,122,049	17.3%
FIE	$7,517,970	$8,161,790	
Net Position to FIE	103.4%	111.8%	8.3%
Gross Rx Claims to Total Net Claims	43.1%	44.1%	
Net Claims PEPY	$9,362	$11,048	18.0%
Average Employees	685	692	1.1%

Observations

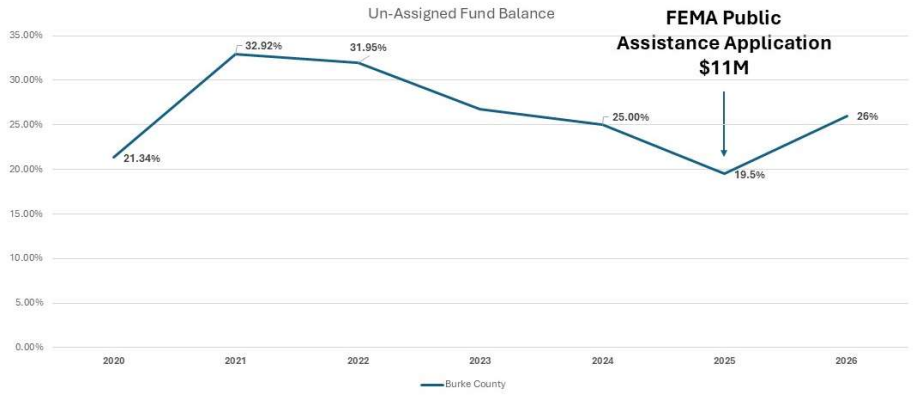
For the current experience period of Jul 1, 2025 to Jun 30, 2026, the group is currently performing unfavorably based on the following:

- Claims net of amounts over the SSL increased 19.3% over the prior year. This is above the medical trend of 10%.
- Prescription drug claims currently account for 44.1% of total claims. This is higher than average.
- There are several large claimants over $62,500, making up 40.5% of the total claims. Typically, high cost claimants make up 20% to 35% of total claims.
- Average number of employees has increased by 1.1% compared to the prior year.

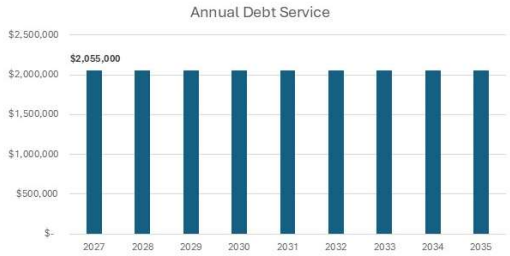
Large Claimants	2024-25	2025-26
Number of Large Claimants (>$62,500)	22	31
Total Paid for Large Claimants (>$62,500)	$2,696,514	$4,084,045
Claimants Over SSL (>$125,000)	8	13
Total Paid Over SSL (>$125,000)	$433,122	$829,651

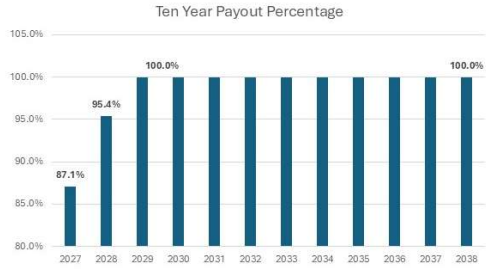
Note: Omits aggregating specific, if applicable.

FY 25-26 Performance Overview



FY 25-26 Performance Overview





FY 25-26 Performance Overview

Total Debt Outstanding	$ 23,600,000		
Debt Item	**Amount**	**Annual Debt Service (P&I)**	**Payoff Date**
County Jail	$ 11,600,000	$ 1,606,750	2037
Total County Debt	$ 11,600,000	$ 1,606,750	
Mountain View Elementary	$ 12,000,000.00	$ 1,646,938.00	2038
Total School Debt	$ 12,000,000.00	$ 1,646,938.00	

Chairman Brittain opened the floor for questions or comments; there being none, he called for a motion.

Motion: To accept the report as presented.

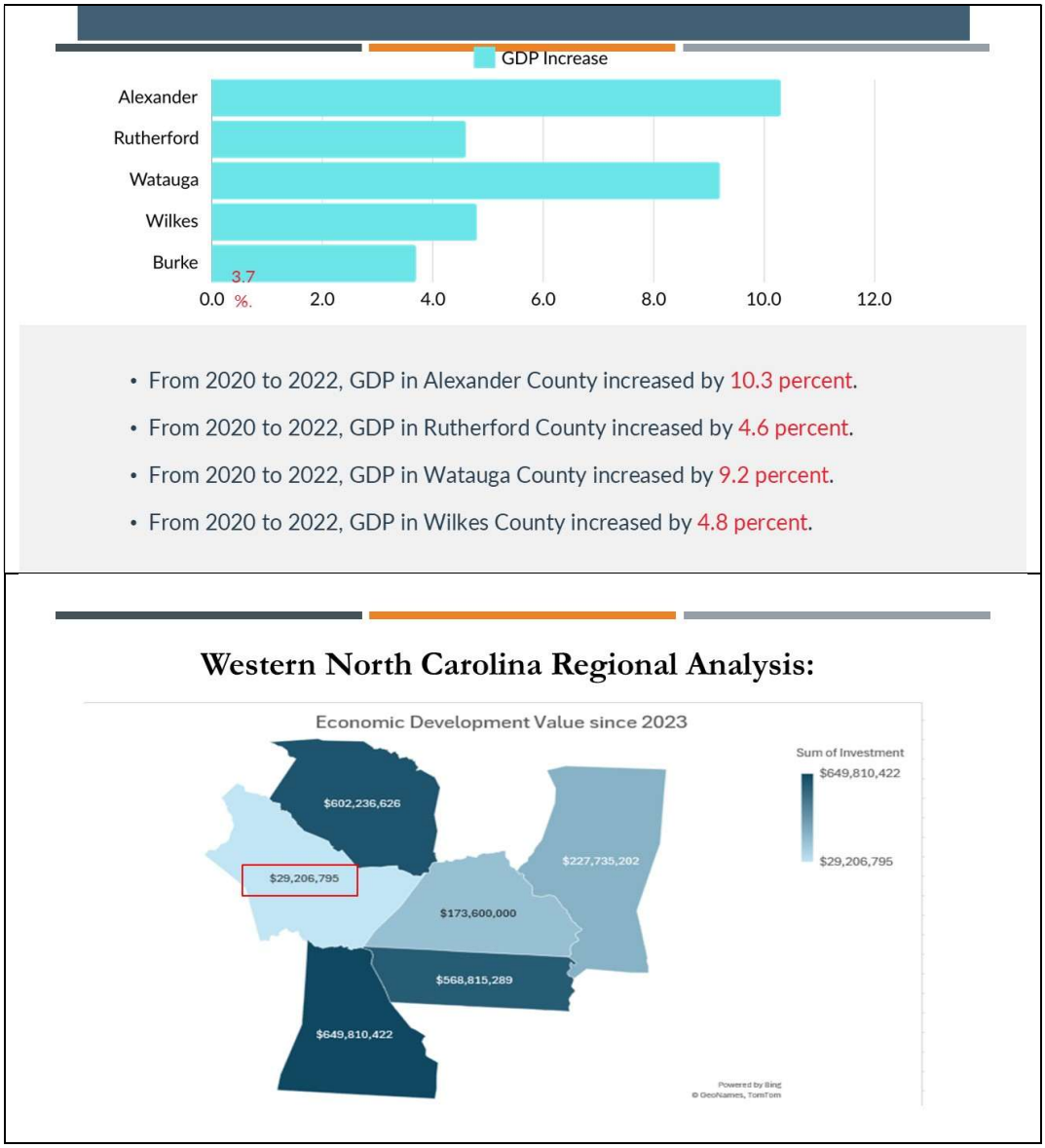
RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Brian Barrier, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

SCHEDULED PUBLIC HEARINGS

CM -ECONOMIC DEVELOPMENT INCENTIVE- PROJECT ICE BEAR & PUBLIC HEARING AT 6:00 P.M.

Brian Epley, County Manager, provided an overview of the importance of economic development for the County as follows:





Brandon Ruppe, President & CEO, BDI, presented the following economic development incentive for consideration:

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BDI
BURKE DEVELOPMENT INCORPORATED

Project Ice Bear

Project	Site	Jobs	CAPEX	Average Wage	Confidence	Urgency
Ice Bear	Hickory Airport	37	$16,955,539	$64,716	High	High

- Family-owned manufacturing company considering Hickory Airport for the construction of a new 60,000 SF facility in Hickory-Burke County.
- Project is competitive with alternate location in Mississippi.





BDI
BURKE DEVELOPMENT INCORPORATED

Project Ice Bear

Project	Site	Jobs	CAPEX	Average Wage	Confidence	Urgency
Ice Bear	Hickory Airport	37	$16,955,539	$64,716	High	High

YEARS	NET NEW INVESTMENT (Cumulative)	40% of the $0.555 tax rate for 3 years
1	$ -	$ -
2	$ 5,900,000.00	$ 13,098.00
3	$ 16,455,539.00	$ 36,531.30
4	$ 16,955,539.00	$ 37,641.30
TOTAL	**$ 16,955,539.00**	**$ 87,270.59**

*For illustration purposes only. Grant payments will be made based on actual taxes paid on net new investment. Illustration does not factor in depreciation.

Questions

Chairman Brittain opened the floor for questions or comments from the Board; there being none, he opened the public hearing at 7:49 p.m. The public hearing notice was published in *the News Herald* on September 10 and September 17, 2026. Further, the notice was also posted on the County's website (www.burkenc.org) on September 10, 2026. There being no one present to address the Board, the public hearing was closed at 7:49 p.m. Chairman Brittain called for a motion.

Motion: To approve the proposed Economic Development Incentive Package for Project Ice Bear pursuant to N.C.G.S. § 158.7.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

RECESS OF THE MEETING
Chairman Brittain called for a brief recess of the meeting at 7:50 p.m., and the meeting resumed at 8:00 p.m.

INFORMAL PUBLIC COMMENTS
Chairman Brittain opened the floor for public comments and asked speakers to limit their comments to three (3) minutes.

Regina Lafferty requested clarification regarding the County's enforcement of junked vehicle ordinances. Ms. Lafferty described a 2014 incident in which she stated she was advised that two (2) vehicles on her property would be towed, although she maintained that both were operable and one (1) was properly tagged and insured. She contrasted that experience with a complaint she filed in July concerning approximately 20 allegedly inoperable or unlicensed vehicles on another property that she stated remained there approximately two (2) months later. Ms. Lafferty expressed concern regarding consistency in enforcement and requested clarification of the criteria for determining whether a vehicle is considered junked. Chairman Brittain advised that the County would follow up with her regarding the matter.

Alice Halstead expressed opposition to the County's use of Flock cameras, citing concerns regarding mass surveillance, data retention and sharing, privacy, and Fourth Amendment protections. She referenced actions taken or considered by other jurisdictions and elected officials regarding automated license plate reader systems. Ms. Halstead urged the Board to remove the cameras, decline future funding for Flock or similar surveillance systems, and publicly state its position on the cameras within 10 days.

Stacey Johnson spoke in opposition to the U.S. Forest Service's proposed rescission of the Roadless Rule. Speaking as a County resident and Lake James Environmental Association Board member, she expressed concern that rescinding the rule could adversely affect forest resources, recreational opportunities, and water quality in local streams, rivers, and Lake James. Ms. Johnson referenced a letter and proposed resolution previously provided by the Association to the Board and requested that the Board consider formally expressing opposition to rescinding the Roadless Rule.

Kimberly Clark, representing Hochoka Retreat Center, provided the Clerk with a packet of materials and addressed an ongoing dispute with the County concerning a property tax exemption request and a tiny house. Ms. Clark stated that the packet included exemption forms and compliance documentation for 2024–2026, as well as a settlement demand letter. She requested the County's assistance in resolving the outstanding exemption matter and litigation, in addition to expressing concerns regarding associated legal expenses. Chairman Brittain stated that the Board could not respond during public comment or discuss ongoing legal matters and would continue working with the County Attorney.

Blake Morgan, representing the future development and planning of Hochoka Retreat Center, addressed the organization's property tax exemption request and development of affordable tiny houses. Mr. Morgan expressed concerns regarding the County's communication and handling of the matter following the filing of litigation in 2024 and stated that Hochoka seeks a collaborative resolution. He reported that three (3) tiny houses are currently situated on the property and

requested that the County designate an administrative liaison to work with the organization on its outstanding tax exemption and development matters.

Marsha Love, a Hochoka Board member, addressed the organization's ongoing legal and property tax exemption matters. She stated that Hochoka's attorney submitted eight (8) questions to the County Attorney in August that she believes remain unanswered and requested clarification regarding the County's treatment of its low-to-moderate-income housing exemption request, including prior tax years. Ms. Love emphasized that Hochoka seeks to resolve the litigation and requested guidance regarding what is required to reach a final tax determination. Following comments by Commissioner Stroud, Will Sparks, Wilson, Lackey, Rohr & Hall P.C., advised the Board not to comment on the ongoing legal matter during public comment.

Monique Presson, a social worker speaking on behalf of Hochoka, spoke about the need for housing and therapeutic services for foster children, particularly in rural communities, and expressed support for Hochoka's tiny homes with wraparound services. She also addressed the organization's ongoing dispute with the County, expressing concern regarding associated legal expenses and stating that questions submitted to the County Attorney remain unanswered. Ms. Presson requested that the County provide answers to those questions to assist in resolving the matter.

Sandy Kelly, speaking on behalf of Hochoka, addressed the organization's ongoing property tax exemption and legal matters. She questioned how the County classifies Hochoka's tiny houses for tax purposes and stated that exemption forms had been filed in 2024 and 2025. Ms. Kelly expressed concern regarding continued legal expenses and requested that the County resolve the low-to-moderate-income tax exemption issue and agree to a settlement by October 5.

Bethany Seagle spoke on behalf of Hochoka and described her positive experience with its farm and equine services. She addressed a public records request submitted by Hochoka for legal billing and disbursement records associated with its case and requested clarification regarding whether additional steps are required and when the records can be expected. Ms. Seagle also reiterated the organization's request for direct responses to the eight (8) questions previously submitted to the County Attorney.

Brandon Brock, a resident of one of Hochoka's tiny homes, spoke in support of the organization and described the assistance he and his wife received after losing their home to a fire. He stated that Hochoka helped them obtain housing, food and other resources and provided opportunities to participate in equine activities and construct their own tiny home. Mr. Brock described the positive impact these services have had on his family and asked the Board to assist Hochoka.

Billy Sutton, a person who resides near Hochoka, spoke in support of the organization and described her positive experiences visiting the property. She praised Hochoka's work of rescuing animals and assisting individuals in need of housing and other support, describing the organization as a place of hope and emphasizing its impact on people's lives.

Christi Eley spoke in support of Hochoka and its animal-assisted therapy, retreats, and tiny home residents. She expressed concern that the ongoing legal matter has diverted time and resources from the organization's work and requested that the matter be resolved so Hochoka can focus on its services.

There being no one else present to address the Board, Chairman Brittain closed this portion of the meeting.

RESULT:	**NO ACTION TAKEN**

CONSENT AGENDA
At the request of the Board, Brian Epley, County Manager, reviewed the following 12 items on the consent agenda, which were approved by a single motion. Upon advice from Wil Sparks, Wilson, Lackey, Rohr & Hall P.C., the Board first considered Commissioner Burns' participation in the vote due to his absence from the pre-agenda meeting at which the items were presented.

Motion: To recuse Commissioner Burns from the vote on the Consent Agenda, due to his absence from the pre-agenda meeting where the materials were presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

C-PACE - COMMERCIAL PROPERTY ASSESSED CAPITAL EXPENDITURES
The North Carolina Commercial Property Assessed Capital Expenditure (C-PACE) Program allows owners of qualifying commercial property to obtain long-term financing from private capital providers for certain qualifying improvements up to 35% of the value of the property. Qualifying improvements include energy efficiency, renewable energy, resiliency, and water conservation, as well as improvements made to address safe drinking water.

Motion: To receive the C-PACE presentation as given and adopt Resolution No. 2026-18, intent to participate, and schedule a public hearing for October 19, 2026.

RESULT:	**APPROVED & ADOPTED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

Resolution No. 2026-18 reads as follows:

BURKE COUNTY
NORTH CAROLINA

RESOLUTION DECLARING INTENT OF BURKE COUNTY, NORTH CAROLINA TO PARTICIPATE IN THE COMMERCIAL PROPERTY ASSESSED CAPITAL EXPENDITURE (C-PACE) PROGRAM

WHEREAS, Article 10B of Chapter 160A of the General Statutes of North Carolina, as amended (the “C-PACE Act”), authorizes the establishment of a statewide commercial property assessed capital expenditure (C-PACE) program (the “C-PACE Program”) that local governments may voluntarily join; and

WHEREAS, the C-PACE Act authorizes the North Carolina Department of Commerce (the “Program Sponsor”) to oversee the C-PACE Program and requires the Economic Development Partnership of North Carolina, Inc., a North Carolina nonprofit corporation (the “Statewide Administrator”), to administer the C-PACE Program and, in support thereof, provide certain administrative services described in N.C. Gen. Stat. § 160A-239.14; and

WHEREAS, the C-PACE Act and C-PACE Program permit willing owners of commercial, industrial, or agricultural real property, or residential real property with five or more dwelling units located in the jurisdictional boundaries of participating local governments ("Qualifying Commercial Property") to obtain direct financing ("C-PACE Financing") from a "capital provider" (as further defined in N.C. Gen. Stat. § 160A-239.12(1), "Capital Provider") for "qualifying improvements" (as further defined in N.C. Gen. Stat. § 160A-239.12(14), "Qualifying Improvements") approved by the Program Sponsor, including energy efficiency measures, resiliency measures, renewable energy measures, and water conservation measures; and

WHEREAS, under the C-PACE Act, C-PACE Financing shall be secured by a (a) voluntary assessment imposed on Qualifying Commercial Property by a local government for the total amount of such financing (the "C-PACE Assessment") and (b) lien on such Qualifying Commercial Property until the financing is paid in full (the "C-PACE Lien"); and

WHEREAS, Burke County, North Carolina, acting by and through its Board of Commissioners, desires to participate in the C-PACE Program and, in support thereof, adopt a resolution setting forth the items required by N.C. Gen. Stat. § 160A-239.15(a);

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of Burke County, North Carolina, as follows:

Section 1. Burke County hereby authorizes (a) the C-PACE Program to operate within its jurisdictional boundaries and (b) the Statewide Administrator to provide the administrative services described in N.C. Gen. Stat. § 160A-239.14.

Section 2. Burke County intends to (a) authorize C-PACE Financing within the jurisdictional boundaries of Burke County, (b) authorize the imposition of C-PACE Assessments to secure repayment of C-PACE Financing, (c) assign the C-PACE Lien to Capital Providers providing C-PACE Financing and (d) delegate billing, collection, and enforcement duties for the C-PACE Assessment and C-PACE Lien to Capital Providers.

Section 3. The amount of any C-PACE Financing and related C-PACE Assessment repayment terms shall be pursuant to an agreement by and among Burke County, the Statewide Administrator, a "property owner" (as defined in the C-PACE Act, a "Property Owner") and Capital Provider (an "Assessment Agreement") and a financing agreement between a Property Owner and a Capital Provider in which a Property Owner agrees to repay a Capital Provider for the C-PACE Financing provided, including, but not limited to, any finance charges, fees, debt servicing, accrual of interest and penalties, and any terms relating to the treatment of prepayment and partial payment, and the billing, collection, and enforcement of the C-PACE Financing.

Section 4. County Manager shall, upon receipt from the Statewide Administrator of an approved project application for C-PACE Financing within the jurisdictional boundaries of Burke County, execute an Assessment Agreement, a Notice of C-PACE Assessment, and an Assignment of C-PACE Lien.

Section 5. Burke County shall be reimbursed by the Statewide Administrator for the actual and reasonable costs associated with the performance of the duties described in Section 4 hereof.

Section 6. A public hearing on the C-PACE Program will be held at 110 N Green St, Morganton, NC 28655, Door E, on October 19, 2026 at 6:00 pm.

Section 7. Nothing in this resolution shall be interpreted as authorizing the County to pledge, offer, or encumber its full faith and credit, and Burke County shall not pledge, offer, or encumber its full faith and credit in connection with any C-PACE Financing.

Section 8. Should any provision or provisions of this Resolution be declared invalid or unenforceable in any respect by final decree of any court of competent jurisdiction, the invalidity or unenforceability of any such provisions shall not affect the remaining provisions of such Resolution.

Section 9. All resolutions or parts thereof in conflict herewith are, to the extent of such conflict, hereby repealed.

Section 10. This Resolution shall take effect upon its adoption.

* * * * * * *

ADOPTED AND APPROVED this 21st day of September, 2026.

* * * * * * *

I, Morgan Buchanan, Clerk to the Board of Commissioners for Burke County, North Carolina, DO HEREBY CERTIFY that the foregoing is a true and complete copy of a resolution adopted by the Board of Commissioners of Burke County at a regular meeting duly called and held on September 21, 2026.

WITNESS my hand and the official seal of Burke County this 21 day of September, 2026.

/s/: Jeffrey C. Brittain
Jeffrey C. Brittain
Burke County Board of Commissioners

Attest:

/s/: Morgan Buchanan
Morgan Buchanan
Clerk to the Board of Commissioners

CD- NC GREAT STATE TRAILS GRANT

Burke County was awarded two (2) Great Trails State Grants in August 2025 for trail development and expansion; the County has now received a grant agreement for the 1780 / Enclave project in the amount of $363,067. The project includes repairs to approximately 1.75 miles of existing trail in the 1780 neighborhood, approximately two (2) miles of new trail in the Enclave neighborhood, a new trailhead, signage, footbridges, neighborhood crossing improvements, and an engineered crossing of NC 126. The required $181,533 local match will be provided through $152,600 in hurricane repair funding from Foothills Conservancy and $28,933 from Duke Comprehensive Relicensing Allocation funding, with no County funds required for construction or repairs. Design and bid documents have been completed by Destination by Design, with the project anticipated to be advertised for bids in the coming month.

Motion: To approve the Great Trails State Grant Agreement for the 1780/Enclave project and authorize the Chairman to execute the agreement on behalf of Burke County.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

EM - APPROVAL OF LEPC BYLAWS

In North Carolina, the purpose and duties of Local Emergency Planning Committees (LEPCs) are aligned with federal and state regulations under the Emergency Planning and Community Right-to-Know Act (EPCRA). LEPCs focus on preparing for and responding to emergencies involving hazardous materials. Their responsibilities include:

- Developing Emergency Plans: LEPCs create and maintain emergency response plans for handling hazardous materials incidents. These plans are shared with local governments, responders, and the public.
- Community Right-to-Know: LEPCs ensure public access to information about hazardous chemicals stored, used, or released in the community, promoting transparency and safety awareness.
- Coordination: The committees coordinate with local governments, industry representatives, and emergency services to prepare for potential hazardous material incidents.
- Training and Exercises: LEPCs conduct training and simulations to test their emergency plans and improve response capabilities.
- Incident Reporting: LEPCs are responsible for receiving reports of hazardous materials releases and ensuring an appropriate response.

LEPCs are established in accordance with N.C.G.S. Chapter 166A, which outlines the broader framework for emergency management, and they work closely with state and local emergency management agencies to fulfill their duties.

Dominic Minor, Emergency Management Manager, has been working to update the bylaws for the Local Emergency Planning Committee (LEPC). Due to the large number of appointed seats, the committee has experienced ongoing difficulty obtaining a quorum. The proposed bylaws would reduce the number of seats to the minimum required by law in an effort to improve meeting attendance and quorum participation.

Due to a lack of quorum being achieved, the LEPC has been unable to formally approve the updated bylaws. However, the members who have been present at recent meetings have expressed support for the proposed changes. Mr. Minor requested that the Board of Commissioners approve the revised bylaws so they may take effect and allow the LEPC to more consistently achieve a quorum moving forward.

Motion: To approve the LEPC bylaws as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

911- BURKE COUNTY AND WPCC MOU FOR BACKUP 911 PSAP AND TELECOMMUNICATOR EDUCATION AND WORKFORCE TRAINING PROGRAM

Burke County Emergency Communications / 911 and Western Piedmont Community College (WPCC) propose two (2) Memoranda of Understanding to establish a shared facility supporting both emergency communications continuity and telecommunicator workforce development. The Backup Emergency Communications MOU establishes a Backup Public Safety Answering Point (PSAP) at WPCC to maintain 911 call-taking and dispatch capabilities during outages, evacuations, maintenance, technology disruptions, or other circumstances affecting the County's primary communications center.

The Telecommunicator Education and Workforce Training MOU establishes a partnership through which Burke County will provide dispatch equipment, technology resources, and operational expertise, while WPCC will provide faculty, program administration, student oversight, and facilities for telecommunicator training. The facility and certain equipment will serve both purposes. However, emergency operations of the Backup PSAP will take priority over instructional use whenever activation is necessary.

Motion: To approve the Memorandum of Understanding with Western Piedmont Community College for Backup Emergency Communications. Further, to approve the Memorandum of Understanding for Telecommunicator Education and Workforce Training and authorize the Chairman or County Manager to execute both agreements on behalf of Burke County.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

CLERK- REMOVAL FROM DEPARTMENT OF SOCIAL SERVICES ADVISORY BOARD
The following Department of Social Services Advisory Board members have requested to be removed from the board:

- Seat No. 1 — At Large — Ms. Nancy Wood
- Seat No. 3— At Large — Mr. John Day

Motion: To approve the removal of Seat No. 1—At Large: Nancy Wood and Seat No. 3—At Large: John Day from the Department of Social Services Advisory Board and thank them for their service to the community.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

CLERK - APPOINTMENT/REMOVAL FROM PARKS AND RECREATION ADVISORY BOARD
The following advisory board members have requested to be removed from the Parks and Recreation Commission:

- Mendell Derreberry, Seat No. 3, Drexel Elementary School District
- Scott Bollinger, Seat No. 8, Mull Elementary School District

An application has been received from Cody Reid for Seat No. 8, Mull Elementary School District, to complete the remainder of a term expiring March 31, 2027.

Motion: To remove Mendell Derreberry and Scott Bollinger from the Parks and Recreation Advisory Board. Further, to appoint Cody Reid to Seat No. 8- Mull Elementary School District with a term expiring March 31, 2027.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

CLERK- REAPPOINTMENTS AND REMOVAL FOR THE BURKE COUNTY PLANNING BOARD

The following board members have terms expiring on September 30, 2026:

- Seat No. 3 (East Burke) - Brian King (requests to be removed from the Burke County Planning Board)
- Seat No. 4 (West Burke)- Gregory Smith (requests to be reappointed)
- Seat No. 6 (West Burke)-Damion Patton (requests to be reappointed)
- Seat No. 7 (West Burke)- Joyce Counihan (requests to be reappointed)

Motion: To remove Brian King from the Burke County Planning Board. Further, to reappoint Greg Smith, Damion Patton, and Joyce Counihan for a 3-year term expiring September 30, 2029.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

CLERK- REAPPOINTMENTS AND REMOVALS FOR THE BURKE COUNTY BOARD OF ADJUSTMENTS

The following board members have terms expiring September 30, 2026:

- Seat No. 1 (East Burke)- Jennie Cook (has served the maximum terms allotted and will be removed)
- Seat No. 3 (West Burke)- James Wakefore (application received to be reappointed for a 3-year term
- Seat No. 5 (At-Large)- Joyce Counihan (application received to be reappointed for a 3-year term)
- Seat No. 6 (At-Large)- Ed Hallyburton (application received to be reappointed for a 3-year term)

Motion: To remove Virginia "Jennie" Cook from Seat No. 1, East Burke. Further to reappoint Seat No. 3—James Wakeford, Seat No. 5 — Joyce Couniham, and Seat No. 6 — Ed Hallyburton for a 3-year term expiring September 2029.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

CM- BUDGET AMENDMENT 4- GRANT AWARDS
This was a request to approve Budget Amendment No. 4 as presented.

Motion: To adopt Budget Amendment No. 4 recognizing funds from multiple grants as presented.

RESULT:	**ADOPTED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

Budget Amendment No. 4 reads as follows:

BUDGET AMENDMENT NO. 4
FY 26-27

BUDGET AMENDMENT NO. 4			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	DESCRIPTION	INCREASE	DECREASE
REVENUES			
100-46504-06-435200-	Duke Energy Grant	$25,000	
EXPENSES			
100-46504-10-585001-	Duke Energy Grant	$25,000	
Purpose: To recognize the grant awarded to Emergency Management from Duke Energy for needed repairs to the rescue boat and the purchase of a drone.			
REVENUES			
100-46503-06-433100	Duke Energy Grant	$10,000	
EXPENSES			
100-46503-10-586001-	Duke Energy Grant	$10,000	
Purpose: To recognize the grant awarded to the Fire Marshal's Department from Duke Energy for specialized cameras to assist in fire investigations.			
REVENUES			
100-54502-06-435200-	Meals on Wheels Donation	$100,000	
EXPENSES			
100-54502-20-586000-	Meals on Wheels Grant	$100,000	
Purpose: To recognize the grant awarded to Senior Services by the regional Meals on Wheels organization to provide additional dollars for congregate and home-delivered meals.			
REVENUES			
100-55500-01-435200-	ARSL Scholarship	$1,500	
EXPENSES			
100-55500-25-551501-	Library Travel and Training	$1,500	

Purpose: To recognize the grant awarded to Page Anderson in the Library Department by the Library of NC. The funds are for hotel and other related travel costs for the 2026 ARSL Conference.			
REVENUES			
100-46000-01-435202-	BJA Edward Byrne JAG	$11,979	
EXPENSES			
100-46000-10-586002-	Grant Expense	$11,979	
Purpose: To recognize the grant awarded to the Sheriff's Office by the Office of Justice Programs, Bureau of Justice Assistance, Edward Byrne Memorial Justice Assistance Grant program. The grant is to replace the existing courthouse security metal detector due to declining reliability and performance.			
REVENUES			
100-46000-01-435200-	Governors Crime Commission	$101,519	
EXPENSES			
100-46000-10-586000-	Software Grant	$101,519	
Purpose: To recognize the grant awarded to the Sheriff's Office by the NC Governor's Crime Commission to provide funding for specialized software to assist with criminal investigation.			
A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.			

Adopted this 21st day of September 2026.

/s/: Jeffrey C. Brittain
Jeffrey C. Brittain
Burke County Board of Commissioners

Attest:

/s/: Morgan Buchanan
Morgan Buchanan
Clerk to the Board of Commissioners

CM- BUDGET AMENDMENT NO. 5 CAPITAL IMPROVEMENTS
This was a request to approve Budget Amendment No. 5 to transfer funds from the Capital Improvement Fund into the General Fund and to execute various planned projects. The project breakdown is as follows: $45,000 for networking equipment in the Emergency 911 center, $36,000 for HVAC replacements at the Foothills Higher Education Center, $240,000 for replacement of public safety radio equipment, and $116,300 for back indexing of the Register of Deeds Records.

Motion: To adopt Budget Amendment No. 5 for Capital Improvements as presented.

RESULT:	**ADOPTED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

Budget Amendment No. 5 reads as follows:

BUDGET AMENDMENT NO. 5
FY 26-27

BUDGET AMENDMENT NO. 5			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	DESCRIPTION	INCREASE	DECREASE
REVENUES			
100-00000-11-439410-	Transfer from Capital Reserve	$116,300	
EXPENSES			
410-00000-55-595100-	Transfer to General Fund	$116,300	
410-00000-05-599999-	Project Set Aside		$116,300
100-43000-05-534010-	Technology Services	$116,300	
Purpose: To transfer funds from the capital reserve for the Register of Deeds back-indexing project.			
REVENUES			
100-00000-11-439410-	Transfer from Capital Reserve	$285,000	
EXPENSES			
410-00000-55-595100-	Transfer to General Fund	$285,000	
410-00000-05-599999-	Project Set Aside		$285,000
100-44500-05-575000	Technology Services	$285,000	
Purpose: To transfer funds from the capital improvement fund to the general fund, to purchase 911 networking equipment ($45,000) and public safety radios ($240,000)			
REVENUES			
100-00000-11-439410-	Transfer from Capital Reserve	$36,000	
EXPENSES			
410-00000-55-595100-	Transfer to General Fund	$36,000	
410-00000-05-599999-	Project Set Aside		$36,000
400-45000-05-542501	CIP - HVAC	$36,000	
Purpose: To transfer funds from the capital improvement fund to the building fund, to complete a planned HVAC replacement project.			
A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.			

Adopted this 21st day of September 2026.

/s/: Jeffrey C. Brittain
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

/s/: Morgan Buchanan
Morgan Buchanan
Clerk to the Board of Commissioners

CM- BUDGET AMENDMENT NO. 6- NC DHHS FUNDS
This was a request to approve Budget Amendment No. 6, which recognizes funds from NC Department of Health and Human Services to be used in a variety of programs.

Motion: To adopt Budget Amendment No. 6 for NC DHHS funds as presented.

RESULT:	**ADOPTED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

Budget Amendment No. 6 reads as follows:

BUDGET AMENDMENT NO. 6
FY 26-27

BUDGET AMENDMENT NO. 6			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	DESCRIPTION	INCREASE	DECREASE
REVENUES			
100-52000-01-434628	Links Special Funds	$34,200	
10-52000-01-433440	DSS Administrative Grant	$36,495	
EXPENSES			
100-52120-20-554000	Links Payments	$34,200	
100-52070-20-554000	Child Welfare Essential Services	$36,495	
Purpose: To recognize additional funding from the state to support the Links Program, which is for clients ages 18-21 in foster care. Funding will be utilized to award direct payments to clients for items including school supplies and other essential needs. Funding is also being provided for Child Welfare essential services, which will be used to meet unmet needs for children in foster care. Further, to budget additional revenue received from the state.			
A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.			

Adopted this 21st day of September 2026.

/s/: Jeffrey C. Brittain
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

/s/: Morgan Buchanan
Morgan Buchanan
Clerk to the Board of Commissioners

CM - BUDGET AMENDMENT NO. 7- MISC. REVENUE BUILDING AND GROUNDS
Budget Amendment No. 7 falls under the Community Advancement focus area. The purpose of this amendment is to recognize a citizen contribution that will be used to mitigate a current code enforcement violation.

Motion: To adopt Budget Amendment No. 7 as presented.

RESULT:	**ADOPTED [UNANIMOUS]**
MOVER:	Jeffrey C. Brittain, Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, and Mike Stroud
RECUSED:	Randy Burns

Budget Amendment No. 7 reads as follows:

BUDGET AMENDMENT NO. 7
FY 26-27

BUDGET AMENDMENT NO. 7			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	DESCRIPTION	INCREASE	DECREASE
REVENUES			
400-00000-00-438000	Miscellaneous Revenue	$29,000	
EXPENSES			
400-45000-05-559000	Contracted Services	$29,000	
Purpose: The purpose of this amendment is to recognize a citizen contribution that will be used to mitigate a current code enforcement violation.			
A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.			

Adopted this 21st day of September 2026.

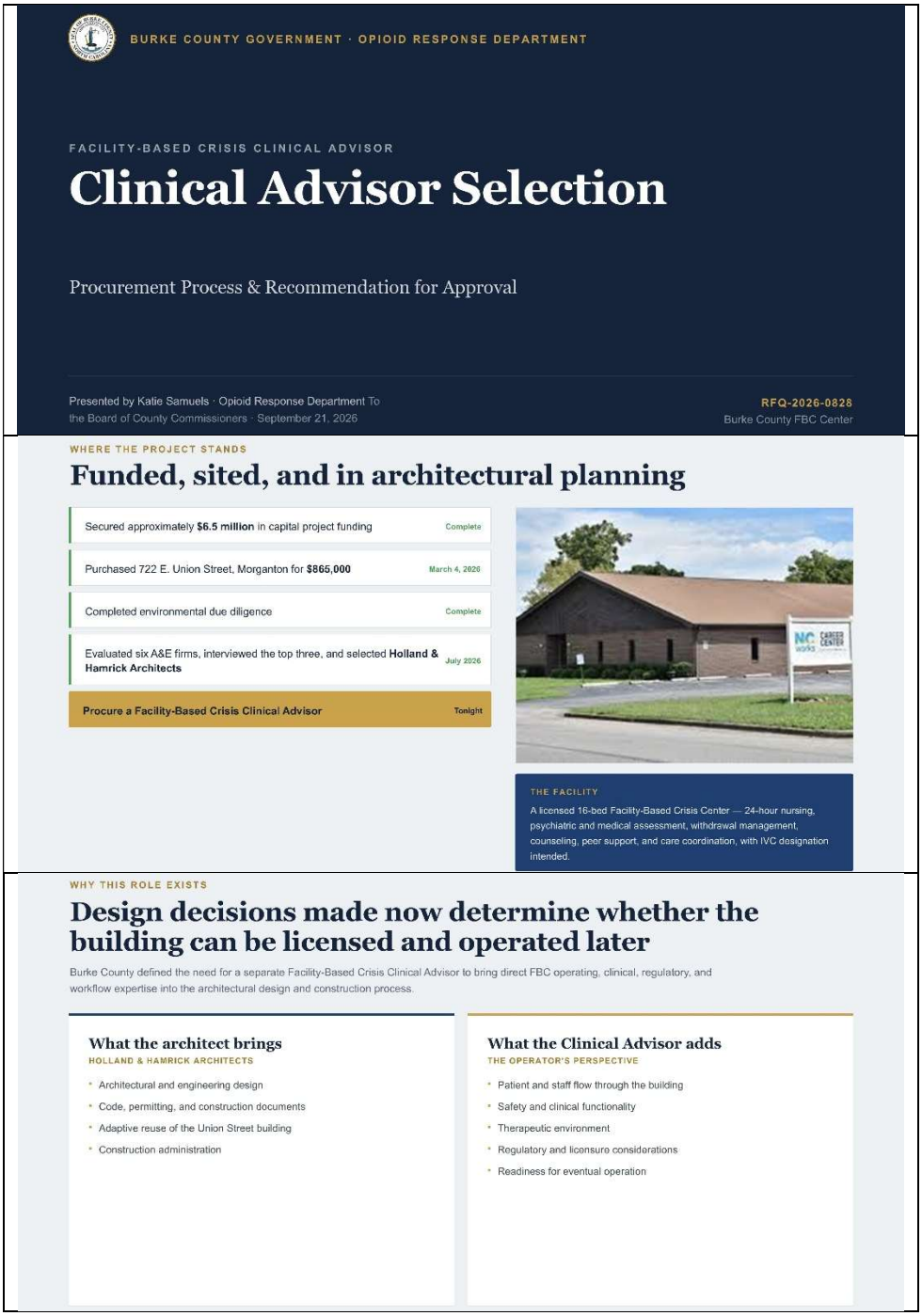
/s/: Jeffrey C. Brittain
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

/s/: Morgan Buchanan
Morgan Buchanan
Clerk to the Board of Commissioners

ITEMS FOR DECISION

OPIOID- RFQ FACILITY-BASED CRISIS CLINICAL ADVISORY SELECTION
Dr. Katie Samuels, Opioid Response Director, presented the recommended firm to serve as Clinical Advisor for the County's new Facility-Based Crisis (FBC) Center as follows:



HOW THE ADVISOR WAS SOLICITED

An open, qualifications-based solicitation

RFQ-2026-0828 sought an experienced behavioral health professional or organization to serve as the County's FBC subject-matter expert during planning, design, and construction.

Aug 7
RFQ Opened
Advertised publicly for the Facility-Based Crisis Clinical Advisor role

Aug 28
Initial Deadline
2:00 p.m. — two Statements of Qualifications received

Sept 4
Extended Deadline
Reopened one additional week to broaden competition — no additional proposals received

Tonight
Recommendation
Approval to begin scope and fee negotiations

STATEMENT OF QUALIFICATIONS RECEIVED

Phoenix Counseling Center

STATEMENT OF QUALIFICATIONS RECEIVED

Recovery Innovations, Inc.

WHAT THE PANEL SCORED

Six criteria, 100 points

Published in the RFQ Five independent evaluators

40	**Direct Facility-Based Crisis operational experience**	Has the respondent actually operated an FBC?
20	**Proposed Clinical Advisor**	Qualifications and availability of the named individual
15	**Understanding of the Burke County project**	Grasp of this site, this community, and this scope
10	**North Carolina regulatory and licensure experience**	DHSR rules, service definitions, current NC practice
10	**Healthcare facility planning & design collaboration**	Track record working alongside design teams
5	**References**	

WHO EVALUATED THE SUBMISSIONS

A five-member independent panel

Each panelist reviewed and scored both Statements of Qualifications independently, using the 100-point criteria established for the procurement.

Burke County Government
PROJECT SPONSOR & OWNER

Katie Samuels
Opioid Response Director

Hugh Sandoe
Burke County Government

Partners Health Management
BEHAVIORAL-HEALTH MANAGING ORGANIZATION

Paul Holden
Partners Health Management

Jamie Sales
Director, Network Operations

Holland & Hamrick Architects
PROJECT ARCHITECT

Greg Melton
Holland & Hamrick Architects

FINAL EVALUATION RESULTS

Phoenix scored higher with every evaluator

Independent scores **100 points** maximum each

EVALUATOR	PHOENIX COUNSELING CENTER	RECOVERY INNOVATIONS, INC.	DIFFERENCE
Katie Samuels · Burke County	**98**	94	+4
Paul Holden · Partners Health Management	**98**	93	+5
Greg Melton · Holland & Hamrick Architects	**89**	69	+20
Hugh Sandoe · Burke County	**91**	83	+8
Jamie Sales · Partners Health Management	**92**	90	+2
COMMITTEE AVERAGE	**93.6**	**85.8**	+7.8

BASIS FOR THE SCORING DIFFERENCE

Two qualified respondents, one closer fit

Both respondents demonstrated substantial behavioral health crisis expertise. Recovery Innovations presented extensive national crisis-system and facility planning experience.

Where Phoenix scored higher across the panel

- Direct North Carolina Facility-Based Crisis operations
- Western North Carolina and regional familiarity
- Current North Carolina regulatory and licensure experience
- Regional accessibility
- Relevant partnerships
- Senior-level direct involvement
- A practical operator perspective on facility design and clinical workflow

COMMITTEE & STAFF RECOMMENDATION

Phoenix Counseling Center

The highest-qualified respondent under the qualifications-based evaluation — and the closest operator-side fit for a licensed Facility-Based Crisis Center.

- Higher total score from each of the five independent evaluators
- Direct North Carolina FBC operating experience
- Current NC regulatory and licensure knowledge
- Senior-level involvement and regional accessibility to the project team

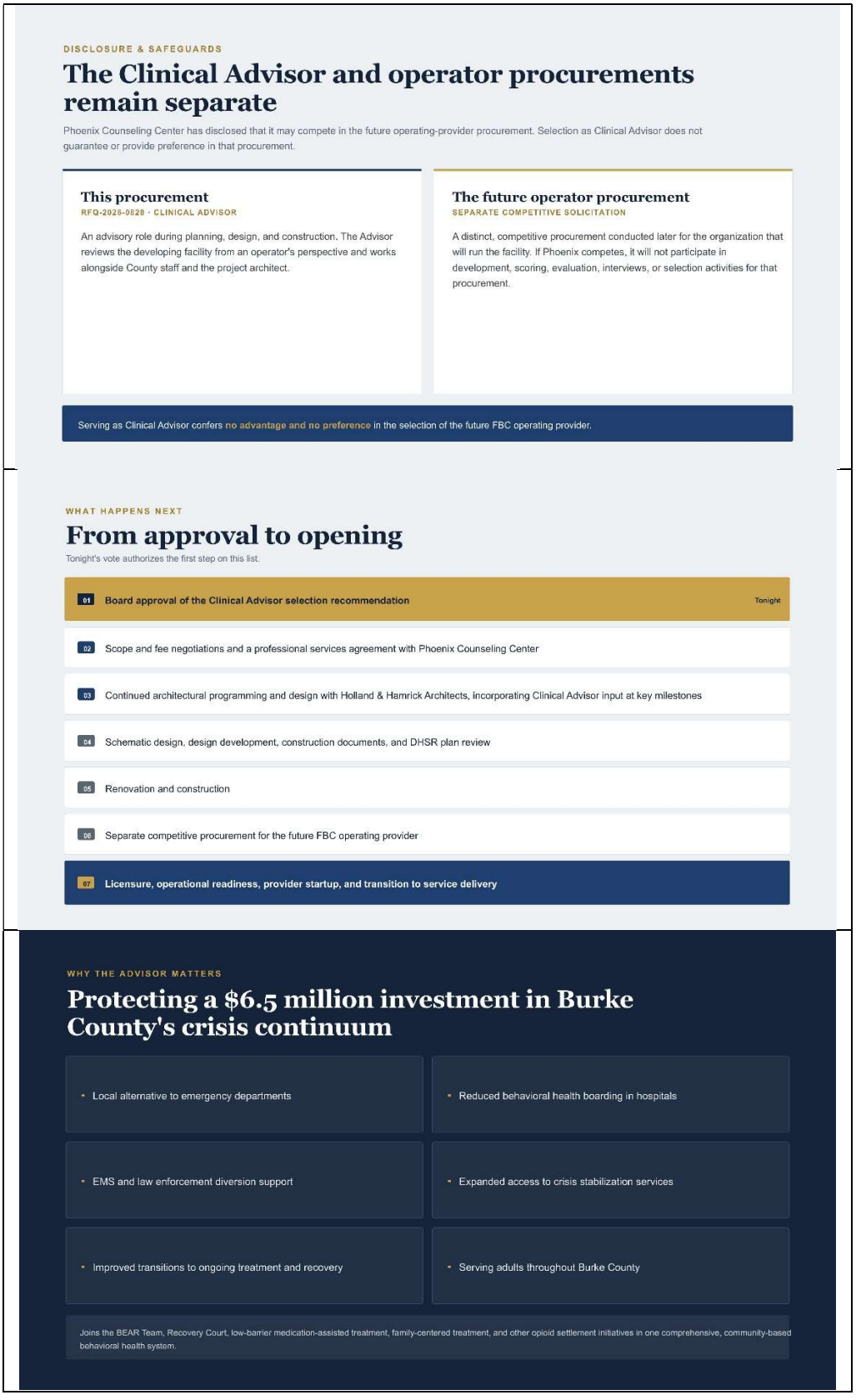
COMMITTEE AVERAGE SCORE

93.6/100

Ranked first by all five evaluators

98 · 98 · 89 · 91 · 92

individual evaluator scores · out of 100


DISCLOSURE & SAFEGUARDS
The Clinical Advisor and operator procurements remain separate
Phoenix Counseling Center has disclosed that it may compete in the future operating-provider procurement. Selection as Clinical Advisor does not guarantee or provide preference in that procurement.
This procurement
RFQ-2026-0828 · CLINICAL ADVISOR
An advisory role during planning, design, and construction. The Advisor reviews the developing facility from an operator's perspective and works alongside County staff and the project architect.
The future operator procurement
SEPARATE COMPETITIVE SOLICITATION
A distinct, competitive procurement conducted later for the organization that will run the facility. If Phoenix competes, it will not participate in development, scoring, evaluation, interviews, or selection activities for that procurement.
Serving as Clinical Advisor confers no advantage and no preference in the selection of the future FBC operating provider.
WHAT HAPPENS NEXT
From approval to opening
Tonight's vote authorizes the first step on this list.
01 Board approval of the Clinical Advisor selection recommendation Tonight
02 Scope and fee negotiations and a professional services agreement with Phoenix Counseling Center
03 Continued architectural programming and design with Holland & Hamrick Architects, incorporating Clinical Advisor input at key milestones
04 Schematic design, design development, construction documents, and DHSR plan review
05 Renovation and construction
06 Separate competitive procurement for the future FBC operating provider
07 Licensure, operational readiness, provider startup, and transition to service delivery
WHY THE ADVISOR MATTERS
Protecting a $6.5 million investment in Burke County's crisis continuum
Local alternative to emergency departments
Reduced behavioral health boarding in hospitals
EMS and law enforcement diversion support
Expanded access to crisis stabilization services
Improved transitions to ongoing treatment and recovery
Serving adults throughout Burke County
Joins the BEAR Team, Recovery Court, low-barrier medication-assisted treatment, family-centered treatment, and other opioid settlement initiatives in one comprehensive, community-based behavioral health system.



FOR BOARD ACTION

Advance the selection and authorize contract negotiations

SUGGESTED MOTION

Approve the selection of **Phoenix Counseling Center** as Burke County's Facility-Based Crisis Clinical Advisor under RFQ-2026-0828, and authorize staff to proceed with scope and fee negotiations and development of a professional services agreement.

→ **If negotiations succeed**
The professional services agreement returns to the Board for final approval.

→ **If negotiations fail**
Staff returns to the Board with next steps, including the next-ranked respondent.

Burke County Opioid Response Department · September 21, 2026

Questions welcome

BID #:	Dated Posted:	Date Closed:
2026-0828	*8/7/2026*	*8/28/2026*
	Dated Reposted:	**Date Closed:**
	8/28/2026	*9/4/2026*

PROJECT:
Facility-Based Crisis Clinical Advisor

Vendor:	Contact:	Phone:	Email:
Phoenix Counseling Center	Kevin Oliver	704-491-0829	kevin@phoenixcc.us
Recovery Innovations, Inc	Kristen Ellis	909-957-0162	Kristen.Ellis@riinternational.com

Scoring Summary		
Respondent	**Total Points Awarded**	**Average Score**
Phoenix Counseling Center	468/500	93.6
Recovery Innovations	429/500	85.8

Review Committee Recommendation
After reviewing both submissions, the selelection committee recomends Phoenix Counseling Center to the Burke County Board of Commissioners.

Chairman Brittain opened the floor for questions or comments; there being none, he called for a motion.

Motion: To approve the selection of Phoenix Counseling Center as Burke County's Facility-Based Crisis Clinical Advisor and authorize County staff to negotiate a professional services agreement consistent with RFQ-2026-0828.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Brian Barrier, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

TAX - TAX RELEASE AND REFUND REPORT FOR PERIOD ENDING AUGUST 31, 2026

Travis Isaacs, Tax Administrator, submitted the Release and Refunds Report for the period ending August 31, 2026, as follows:

Tax System Refunds and Releases			
Report Amount	Rebilled Amount	Net Release	Refund Amount
$28,665,554	$28,348,888	$316,802	$0.00

VTS Refunds Over $100	
	Refund Amount
VTS Adjustments	$552.39

Note: The net release amount results from the reported amount minus the rebilled amount.

Chairman Brittain opened the floor for questions or comments; there being none, he called for a motion.

Motion: To accept the Tax Release and Refund Report as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

TAX - TAX COLLECTION REPORT FOR PERIOD ENDING AUGUST 31, 2026

Travis Isaacs, Tax Administrator, submitted the Tax Collection Report for the period ending August 31, 2026, as follows:

Year-to-Date Revenue Collections				
	Budget	Actuals to Date	% Collected	$ Remaining
Current Year Taxes	$65,587,042	$31,711,682	52%	$33,875,360
Discounts	($350,000)	($317,312)		
Delinquent Taxes	$700,000	$300,943	43%	$399,056
Interest and Fees	$329,000	$25,083	8%	$303,916
Total	$61,174,871	$31,720,396		

Total Levy For 2026-2027 Tax Year				
	Current Year Amended Levy	Current Year Collected	% Collected	$ Remaining
Property Taxes	$55,188,976	$31,876,778	58%	$23,037,355
Motor Vehicle Taxes	$5,456,857	$1,220,550	22%	$1,042,843
Fire Tax	$7,511,783	$4,352,463	41%	$3,124,531

Motion: To accept the Tax Collection Report as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Randy Burns, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

TA - COLLECTOR'S ANNUAL SETTLEMENT REPORT 2025-2026
Travis Isaacs submitted the annual Tax Settlement Report for FY25-26 to the Board. Chairman Brittain opened the floor for questions or comments; there being none, he called for a motion.

Motion: To accept the Tax Collection Settlement Report for 2025-2026 as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Phil Smith, Vice Chairman
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

The Tax Collections Annual Settlement Report for FY 2025 – 2026 reads as follows:

Burke County Board of Commissioners:

I respectfully submit the following Tax Collections Settlement for the period of July 1, 2025, through June 30, 2026.

In compliance with NCGS 105-373(a)(1) & (3)(d), included are the amounts collected using the NC Property Tax System (NCPTS) and the NC Vehicle Tax System (NCVTS) for the county, fire districts, and municipalities. These amounts include current and delinquent taxes collected and uncollected for the above period. Also, the county tax administrator's office collects for:

- Connelly Springs
- Glen Alpine
- Hildebran
- Long View
- Rhodhiss
- Drexel
- Valdese

Section 1: Property Tax County Only
(Data from NCPTS TR-401E Report)

	Collected	Uncollected
• Tax-Current (2025)	$54,463,015.19	$ 909,913.46
• Delinquent Tax (2024-prior)	$ 720,637.80	$ 871,688.89
• Total	$55,183,652.99	$1,781,602.35

Total of Taxes and Tax-Related Collections (County Only) 2025-Prior

	Collected	Uncollected
• Advertisement Fee	$ 19,436.64	$ 46,527.23
• Garnishment	$ 49,884.00	$ 6,698.10
• Interest	$ 281,480.63	$ 0.00
• Landfill User Fee	$ 3,529,870.65	$ 248,694.00
• Landfill User Fee Sr.	$ 81,347.64	$ 5,785.71
• Late List Penalty	$ 137,817.27	$ 19,529.40

• Migrated LFUF	$ 0.00	$ 0.00
• Misc. Cost	$ 0.00	$ 0.00
• NSF Penalty	$ 7,778.00	$ 751.01
• Tax All Years	$55,207,902.73	$ 1,657,580.31
• Total	$59,315,517.56	$ 1,985,465.76

Section 2: RMV Tax County Only
(Data from NCVTS Net Distribution Report)

	Collected
• VTS RMV Interest	$ 44,618.45
• VTS RMV Tax	$ 6,484,233.05
• Total	$ 6,528,851.50

Section 3: Fire District County & RMV Tax
(Data from TR-401E NCPTS Report & NCVTS Net Dist. Report)

	Collected	Uncollected
• FD Tax Current (2025)	$ 6,402,430.81	$ 100,510.76
• FD tax Interest (2025)	$ 17,395.86	$ 0.00
• FD Prior & Int (2024-Prior)	$ 109,629.28	$ 74,892.78
• VTS RMV FD Int	$ 5861.35	$ 0.00
• VTS RMV FD Tax	$ 874,860.40	$ 0.00
• Totals	$ 7,410,177.70	$ 176,295.06

Section 4: Property Tax City/Town
(Data from TR-401E NCPTS)

	Collected	Uncollected
• City & Town (2025)	$ 4,163,308.98	$ 38,425.27
• City & Town (2024-Prior)	$ 27,551.54	$ 10,785.71
• Interest 2025-Prior	$ 13,683.58	$ 0.00
• Late List Penalty 2025-Prior	$ 3,866.62	$ 278.63
• Landfill User Fee 2025-Prior	$ 14,523.00	$ 197.84
• Total	$ 4,222,933.72	$ 49,687.45

Section 5: RMV Taxes City Town 2025
(Data from NCVTS Net Distribution Report)

	Collected
• VTS RMV Int	$ 10,926.75
• VTS RMV Tax	$1,562,386.12
• VTS Morganton Tag Fee ($20)	$ 296,140.00
• VTS Hickory Tag Fee ($5.25)	$ 796.25
• Total	$1,870,249.12

Section 6: Additional Revenues Collected
(Data from NCPTS TR-426 & TR-431)

	Collected
• Rental Vehicle (County)	$ 68,225.00
• Rental Vehicle (Hickory)	$ 12,789.79
• Occupancy Tax	$1,011,305.64
• Occupancy Tax (Late Penalty)	$ 129.52
• Occupancy Filing (Penalty)	$ 107.61
• Beer License (On Premises)	$ 1,575.00
• Beer License (Off Premises)	$ 400.00
• Wine License (On Premises)	$ 1,450.00
• Wine License (Off Premises)	$ 1,800.00
• Total	$1,097,782.56

SECTION 12 - Summary of Enforced Collection Activity
Enforced collections of delinquent tax bills can use several different remedies as allowed by N.C.G.S. § 105-367, 368, 374, and 375.

- Debt Setoff
- Bank Attachment/garnishment
- Wage Garnishment
- Foreclosure

I certify that the collections staff has diligently tried using the collection remedies available by statute (notices, second notices, wage garnishment, bank attachment, debt set-off, foreclosure, and delinquent collection service) to collect all delinquent debts. These delinquent debts are for tax years 2014 through 2023, including those 2024 taxes that became delinquent after January 5, 2025.

I respectfully request that the Burke County Board of Commissioners accept this report as the Annual Settlement for the Fiscal Year Ending June 30, 2026

/s/ Travis J. Isaacs
Travis J. Isaacs
Tax Administrator

BOC - REPORT & COMMENTS
Chairman Brittain shared information regarding upcoming community events and Board meetings. He also invited youth groups to sign up to lead the Pledge of Allegiance at future Board of Commissioners meetings and encouraged members of the clergy and other faith leaders to contact the Clerk to deliver the invocation. Chairman Brittain then opened the floor for reports and comments from Board members and professional staff. Commissioner Stroud expressed appreciation for the Board, Sheriff, and County leadership and their commitment to serving Burke County. Commissioner Burns echoed his remarks and announced that he would be sworn into his fourth term on the North Carolina Association of County Commissioners Board of Directors in late October. Vice Chairman Smith stated that it was an honor and privilege to serve the citizens of Burke County. There being no additional comments, he proceeded to the next item of business.

RESULT:	**NO ACTION TAKEN**

VACANCY ANNOUNCEMENTS
Morgan Buchanan, Clerk to the Board of Commissioners, announced the following vacancies on county boards or committees as follows:

- Adult Care & Nursing Home Community Advisory Committee
- America 250 NC Committee
- Burke County Board of Adjustment
- Burke County Department of Social Services Advisory Board
- Burke County Parks & Recreation Commission
- Burke County Public Health Advisory Board
- Burke Senior Center Advisory Council
- Dangerous Dog Appeal Board
- Drexel Planning Board - ETJ Alternate
- Hickory Regional Planning Commission
- Juvenile Crime Prevention Council
- Local Emergency Planning Committee (LEPC)

The Clerk encouraged citizens to participate and get involved.

RESULT:	**NO ACTION TAKEN**

CLOSED SESSION

RESULT:	**NOT NEEDED, NOT HELD**

ADJOURN
Motion: To adjourn the meeting at 8:51 p.m.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Phil Smith, Brian Barrier, Randy Burns, and Mike Stroud

Approved this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

MINUTES
BURKE COUNTY BOARD OF COMMISSIONERS
PRE-AGENDA MEETING

The Burke County Board of Commissioners held a pre-agenda meeting on Monday, October 5, 2026, at 3:00 p.m. in the Commissioners' Meeting Room, Burke County Services Building, 110 N. Green Street, Entrance E, in Morganton, North Carolina. The meeting was streamed live on the County's YouTube channel, BurkeCountyNC, and it was broadcast on the local cable systems. The agenda, in its entirety, was posted to the County's website, www.burkenc.org, several days prior to the meeting. Pursuant to Resolution No. 2024-17, adopted and effective on August 20, 2024, the Burke County Board of Commissioners conferred upon itself all the power, duties, and responsibilities of the Board of Health and the Social Services Board. Those present were:

COMMISSIONERS:	Jeffrey C. Brittain, Chairman Brian Barrier Randy Burns Mike Stroud
COMMISSIONERS ABSENT:	Phil Smith, Vice Chairman (Out of Town)
STAFF:	Brian Epley, County Manager Dylan Laws, Wilson, Lackey, Rohr & Hall P.C. Morgan Buchanan, Clerk to the Board of Commissioners Chandler Bumgarner, Interim Finance Director Ethan Bumgarner, Deputy Finance Director

CALL TO ORDER
Chairman Brittain called the meeting to order at 3:00 p.m.

APPROVAL OF AGENDA

Motion: To approve the agenda as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Randy Burns, Commissioner
AYES:	Jeffrey C. Brittain, Brian Barrier, Randy Burns, and Mike Stroud
ABSENT:	Phil Smith

PRESENTATIONS

CM - RECOGNITION FOR 2026 FALL CITIZENS ACADEMY
Brian Epley, County Manager, requested the Board recognize the Fall 2026 Citizens Academy participants during their regular meeting. Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

BCCOC- PROCLAMATION DECLARING OCTOBER 21, 2026, NATIONAL CHAMBER OF COMMERCE DAY
Chairman Brittain announced that Tonia Stephenson, President & CEO of the Burke County Chamber of Commerce, will present this item at the Board's regular meeting.

Additional information from the agenda packet:

> Support Your Local Chamber of Commerce Day is observed annually on the third Wednesday in October to recognize the important role chambers of commerce play in supporting businesses, strengthening local economies, and fostering community partnerships. The Burke County Chamber of Commerce has served as a trusted resource for local, regional, and national businesses and their employees since 1945. The proclamation recognizes October 21, 2026, as Support Your Local Chamber of Commerce Day in Burke County and highlights the Chamber's continued commitment to Growing Business. Building Community.

This item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

SCHEDULED PUBLIC HEARINGS

C-PACE- PUBLIC HEARING FOR THE CONSIDERATION OF PARTICIPATION IN THE C-PACE PROGRAM & PUBLIC HEARING

Brian Epley, County Manager, explained that the Board of Commissioners previously adopted a Resolution of Intent to participate in North Carolina's Commercial Property Assessed Capital Expenditure (C-PACE) Program. C-PACE is a voluntary statewide program that allows eligible commercial property owners to obtain private, long-term financing for qualifying improvements, including energy efficiency, water conservation, renewable energy, and resiliency projects. The next required step is a public hearing and formal approval of participation. He noted that the program would provide an additional economic development tool to attract private capital investment through favorable financing options.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CD- ZMA 2026-04, 2763 US 64 MORGANTON, NC- ZONING MAP AMENDMENT & PUBLIC HEARING

Patrick Dickinson, Planner, reported that the Community Development Department received a rezoning application (ZMA 2026-04) from Bryson Carlton to rezone a 2.95-acre parcel at 2763 US 64 from Residential-Three (R-3) to General Business (G-B) to establish an automotive tint and vehicle detailing shop.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CD- ZMA 2026-05, 7857 OLD NC HWY 10, HICKORY, NC- ZONING MAP AMENDMENT & PUBLIC HEARING

Patrick Dickinson, Planner, stated that the Community Development Department received a rezoning application (ZMA 2026-05) from Chad Huffman and Catherine Stillwell to rezone a 2.7-acre parcel at 7857 Old NC 10 from Residential-Two (R-2) to General Business (G-B) to accommodate future commercial redevelopment.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CM – PUBLIC HEARING CONSIDERING THE RESOLUTION OF SUPPORT FOR PIEDMONT AFFORDABLE SENIOR HOUSING FOUNDATION AND THE BERKELEY

Brian Epley, County Manager, presented a request the County received from the Piedmont Affordable Senior Housing Foundation as follows:



Piedmont Affordable Senior Housing Foundation, Inc. ("PASHF")

Requestor:

Piedmont Affordable Senior Housing Foundation is a North Carolina nonprofit corporation. PASHF is buying six (6) senior living communities across North Carolina. One of them, The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655, is in Burke County. The Berkeley is an assisted living and memory care community, serving older adults.

How is PASHF Paying for the Purchase:

PASHF is borrowing money to help pay for these communities. It plans to borrow the money through bonds. A bond works much like a loan: investors provide money up front, and PASHF pays it back over time, with interest, similar to a mortgage.

Because PASHF is a nonprofit that serves seniors, federal tax law allows the interest on these bonds to be exempt from federal income tax. That tax break lowers PASHF's borrowing costs, which helps keep the communities financially healthy and helps keep care affordable for residents.

The Berkeley in Burke County

Local Fact	Current Information
Location	330 Juniper Street, Morganton
Real Property Owner	FP Real Estate Investments LLC
Estimated Real Property Value	$8,351,311
County Property Tax Paid, Tax Year 2026	$45,886.26

What is TEFRA?

Congress created the Tax Equity and Fiscal Responsibility Act of 1982 (TEFRA) to limit the use of tax-exempt bonds.

TEFRA ensures that only projects with substantial public benefit can be financed this way. These are commonly used for senior care centers, charter schools, etc. throughout the State and the nation. These types of resolutions are common and the County (or other NC entities) for non-profit 501(c)(3) entities to access tax exempt funds for their projects.

Before a tax-exempt bond issue can proceed, it must get public approval. Approval is typically given after a public hearing where residents are given at least seven (7) days. The hearing allows the public to comment, and the approval must occur within one year before the first bond issue under the plan. Because Congress can't assess local needs, the approval process ensures local government has the opportunity to review and decide.

Without TEFRA approval, the bonds cannot be tax-exempt, which affects borrowing costs and eligibility for certain financing programs.

The IRS explains that bonds issued under § 145 can receive tax-exempt treatment under § 103 when the applicable requirements are met. Internal Revenue Service The public approval procedure appears in § 147(f) and **Treasury Regulation § 1.147(f)-1**.

Tax-Exempt Financing: IRC Framework

IRC section	Role
§ 103(a)	Provides the federal income-tax exclusion for interest on qualifying state and local bonds.
§ 145(a)	Defines the qualified nonprofit bonds proposed for this transaction, subject to ownership, use, and other requirements.
§ 147(f)	Establishes the TEFRA public hearing and elected-government approval requirement, which is why Burke County's participation is requested.

The Berkeley / Burke County Board of Commissioners

NC Personal Care Services Alignment Demonstration

Proposed Section 1115 waiver under enacted S.L. 2025-64 (HB 546)

CMS APPROVAL REQUIRED

Public comment: Sept. 10–Nov. 9, 2026, closing at 5 p.m. Eastern

Eligibility and scope	Proposed demonstration
Who qualifies	Medicare beneficiaries living in or seeking admission to licensed adult care homes or special care units
Income limits	Above the Special Assistance limit, up to 180% of poverty for adult care homes or 200% for special care units
Other requirements	Assessed need for PCS, other Special Assistance requirements and Medicaid nonfinancial eligibility rules
Covered benefit	Personal care services only, such as help with bathing, dressing, eating, mobility and toileting
Program scale	Estimated 6,000 people statewide at full implementation, with about an 11-month phase-in
Delivery and duration	Five years statewide through NC Medicaid Direct, the fee-for-service system

Coverage boundaries

Residents pay room and board. The waiver provides PCS only, rather than full Medicaid.
Medicare stays primary. Existing PCS rules and rates remain unchanged.
No added premiums, copays or deductibles. Current Medicaid benefits stay unchanged.

Source: NC Medicaid, proposed PCS Alignment Demonstration, September 2026

Parker Poe
Attorneys & Counselors at Law

WARD AND SMITH, P.A.
ATTORNEYS AT LAW

County Fiscal Considerations

Bond Repayment

The County will have no repayment liability or loan guarantee.

Does not impact County bond rating.

County affords no endorsement of Foundation's ability to pay bonds.

Property Tax

The Foundation has communicated an intent to file for local property tax exemption – which will be reviewed and processed in accordance to N.C.G.S. 105. But not a guarantee or automatic.

10

Foundation By Laws - 40% Medicaid commitment

40%

Reported minimum Medicaid participation

Bylaws and governing authority needed

2

Current Medicaid residents
Total resident census needed

08

Board of Commissioners:

The public benefit determination

Will lower financing costs help more lower-income seniors obtain affordable housing and care at The Berkeley?

05

Next Steps:

Schedule & Advertise Public Hearing
10/19/2026
Consider Resolution of Support

Additional information from the agenda packet:

The Burke County Board of Commissioners will conduct a public hearing regarding the proposed issuance by the Public Finance Authority of its

> Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026.
>
> The bond financing will support the acquisition of six senior-living communities in North Carolina, including The Berkeley, an assisted living and memory care community located at 330 Juniper Street, Morganton, North Carolina. The bonds are proposed in an aggregate principal amount not to exceed $115,000,000, of which not more than $25,000,000 will be allocated to the acquisition of The Berkeley.
>
> Following the public hearing, the Board will consider adoption of Resolution No. 2026-23 supporting the proposed bond financing solely as it relates to The Berkeley. Burke County will not issue the bonds and will not borrow, lend, guarantee, or otherwise assume financial responsibility for repayment of the bonds.

Chairman Brittain opened the floor for questions or comments. Commissioner Stroud asked about The Berkeley's current capacity and how the proposed transition would affect existing residents. Mr. Epley stated that the facility has 60 beds, with approximately 40% (24 beds) expected to serve Medicaid recipients under the proposed model. Dr. Lindsey Duch, President of the Piedmont Affordable Senior Housing Foundation, reported that the facility was approximately 97% occupied and that many prospective residents were currently turned away due to Medicaid eligibility restrictions. Mr. Epley clarified that no existing residents would be displaced and that the transition would occur gradually through normal resident turnover. Dr. Duch noted that the average assisted living stay is approximately 18 months, with the resident population expected to transition over the next couple of years.

Commissioner Burns asked whether the increased Medicaid population would create additional regulatory responsibilities or staffing demands for and of the County departments. Mr. Epley explained that the facility's capacity would remain unchanged and that he did not anticipate additional County staffing needs as a direct result of a change in ownership of the facility. He acknowledged that broader changes to Medicaid eligibility and state policies were increasing the administrative workload for Social Services but did not attribute those impacts to the proposed matter.

Commissioner Barrier raised several questions regarding the nonprofit foundation's governance, financial structure, and future operations. Dr. Duch confirmed that she serves as president under the oversight of a governing board and agreed to provide a list of the organization's officers and directors before the regular meeting. She confirmed that the Piedmont Affordable Senior Housing Foundation would own the Berkeley following the transaction. She further explained that ALG Senior would remain under contract to manage the facility for three (3) years, after which the nonprofit's board would determine whether to renew the agreement.

Commissioner Barrier requested a detailed breakdown of the proposed $115 million bond financing, including allocations among the six (6) properties, reserves, and insurance costs. Dr. Duch agreed to provide the information and clarified that $115 million represented the maximum financing amount, rather than the amount necessarily to be borrowed. She explained that proceeds would be allocated among the properties to address existing debt. Commissioner Barrier also questioned the potential consequences for residents if the nonprofit were unable to meet its debt obligations. Dr. Duch indicated that residents could face relocation to other facilities, similar to the consequences of a mortgage default under the current ownership structure. She

emphasized that the continued partnership with ALG Senior would provide operational experience and stability, while the nonprofit ownership model was intended to improve affordability and expand access to assisted living for lower-income seniors.

Commissioner Barrier expressed concern about the potential loss of approximately $45,000 in annual property tax revenue if the facility became tax-exempt. He acknowledged the importance of affordable senior housing but emphasized the need to weigh those benefits against the County's existing tax-exempt property base and the financial implications of adopting a resolution of support.

There being no further discussion, this item was moved without objection to the next meeting.

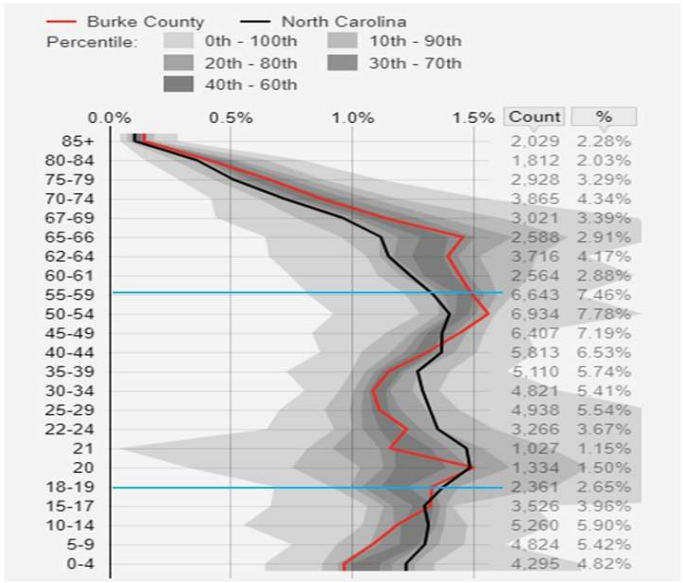
RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CM – PUBLIC HEARING FOR THE CONSIDERATION OF THE CLOVER RIDGE SUBDIVISION DEVELOPMENT AGREEMENT AND MOU

Brian Epley, County Manager, presented a development agreement and Memorandum of Understanding regarding the development for the Clover Ridge Subdivision as follows:





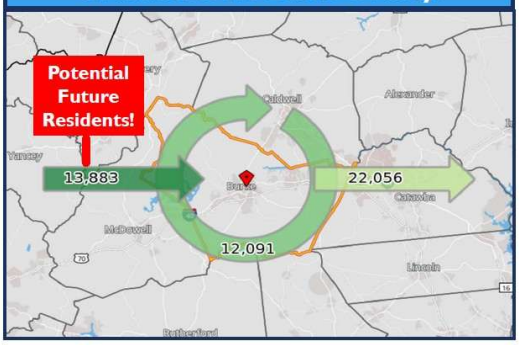


Potential Commuter Support

Nearly 14,000 individuals from surrounding areas commute into Burke County for employment, accounting for 53.4% of the people employed in Burke County.

Commuter Profile:
Over half (51.1%) of in-commuters are between **ages 30 & 54,** and **36.3% earn over $40,000** annually.

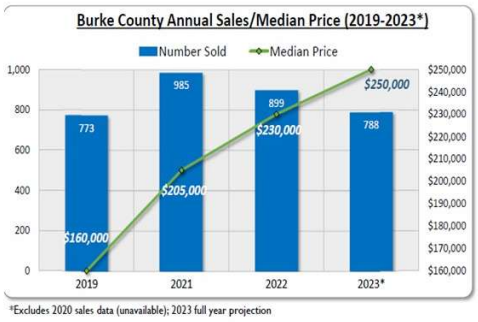
The large number of people that commute daily into the area for work represent a large base of **potential new residents/ households for Burke County.**



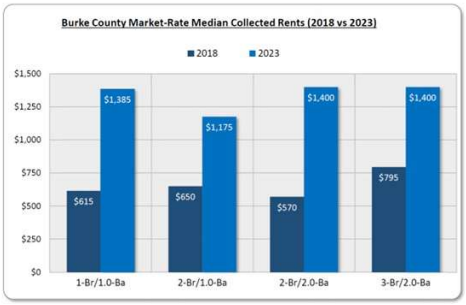
BURKE COUNTY MLS DATA

	March			Year to Date		
Key Metrics	**2024**	**2025**	Percent Change	**Thru 3-2024**	**Thru 3-2025**	Percent Change
New Listings	489	**489**	0.0%	1,247	**1,347**	+ 8.0%
Pending Sales	399	**385**	- 3.5%	1,021	**1,053**	+ 3.1%
Closed Sales	323	**319**	- 1.2%	827	**906**	+ 9.6%
Median Sales Price*	$284,000	**$292,000**	+ 2.8%	$279,900	**$291,500**	+ 4.1%
Average Sales Price*	$332,990	**$367,826**	+ 10.5%	$321,077	**$352,609**	+ 9.8%
Percent of Original List Price Received*	96.3%	**94.8%**	- 1.6%	94.9%	**94.4%**	- 0.5%
List to Close	89	**100**	+ 12.4%	90	**100**	+ 11.1%
Days on Market Until Sale	44	**55**	+ 25.0%	46	**56**	+ 21.7%
Cumulative Days on Market Until Sale	48	**66**	+ 37.5%	50	**65**	+ 30.0%
Average List Price	$412,770	**$439,579**	+ 6.5%	$384,388	**$426,534**	+ 11.0%
Inventory of Homes for Sale	767	**1,024**	+ 33.5%	--	**--**	--
Months Supply of Inventory	2.4	**3.0**	+ 25.0%	--	**--**	--

Cost of Housing Change



*Excludes 2020 sales data (unavailable); 2023 full year projection



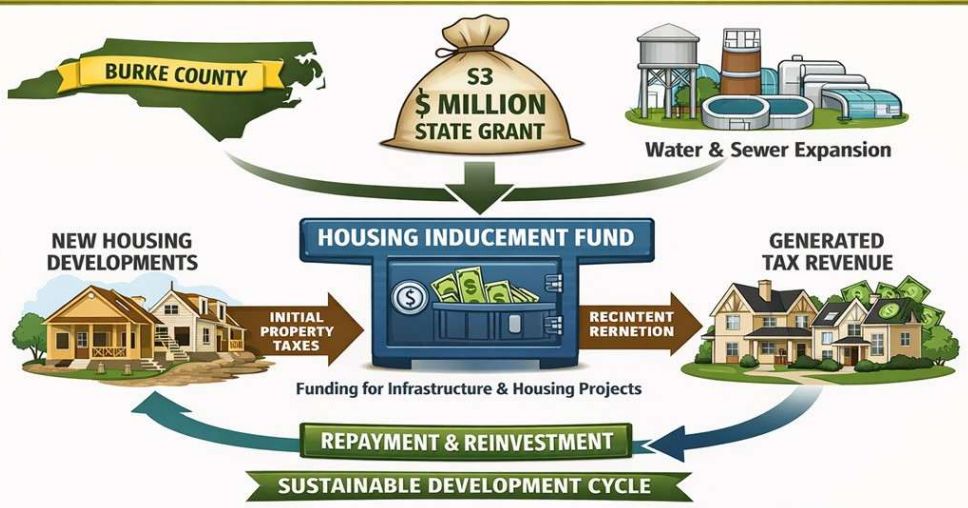
Housing Gap Estimates (For-Sale Housing)

Burke County has an **Overall For-Sale Housing Gap** of **Approximately 3,323 Residential Units** at a **Variety of Affordability Levels.**

	Burke County, North Carolina For-Sale Housing Gap Estimates (2023-2028)			
Percent of Median Income	**≤ 50%**	**51%-80%**	**81%-120%**	**121%+**
Household Income Range	**≤$35,650**	**$35,651-$57,040**	**$57,041-$85,680**	**$85,681+**
Price Point	**≤ $118,833**	**$118,834-$190,133**	**$190,134-$285,600**	**$285,601+**
Household Growth	-871	-607	163	2,139
Balanced Market	182	157	112	244
Replacement Housing	179	78	36	36
External Market Support	374	217	199	400
Severe Cost Burdened	197	98	33	0
Step-Down Support	0	872	988	-1,860
Less Pipeline Units	0	0	-14	-29
Overall Units Needed	**61**	**815**	**1,517**	**930**

The greatest gap appears to be for housing priced between $190,134 and $285,600 (1,517 units) for households generally earning between $57,041 and $85,681.

Housing Inducement Fund & Sustainable Development Cycle



State grant for municipal water and wastewater expansion will facilitate housing developments to currently unserved land tracts.

Development Agreement Overview

Project Overview

CLOVER RIDGE	APPROX. 25 RESIDENTIAL LOTS.	SINGLE-FAMILY HOMES + AMENITIES.	ESTIMATED $7.5M TAX BASE.	~$41,250 ANNUAL COUNTY TAX REVENUE.

Parties Involved

Burke County, NC

Morganton

Western Carolina Developers

Collectively referred to as 'Parties'.

Clover Ridge Housing Development

- 25 Single-Family Homes
- +/- 1,800 square feet
- $300k Average Value

- Public Infrastructure Grant: $300k



Purpose of Agreement

- Provides long-term framework for phased development.
- Ensures coordination of public/private resources.
- Stabilizes development standards over time.
- Authorized under NC General Statutes 160D.

Developer Obligations

- Install on-site infrastructure (roads, stormwater, utilities).
- Install Streets.
- Meet development schedule.
- Provide annual progress reports.
- Comply with ordinance.

Performance Requirements

- Minimum 25 homes required.
- Avg. value: $300,000.
- 3-year deadline after sewer availability.
- Payments required if targets not met.

Financial Penalties

$12,000 PER MISSING DWELLING.

PER-DWELLING PENALTIES FOR LOW VALUE HOMES.

ENSURES RETURN ON PUBLIC INVESTMENT.

Security & Enforcement

- Deed of Trust secures obligations.
- County may foreclose if default.
- Permits may be withheld upon breach.

Amendments & Reviews

AMENDMENTS REQUIRE MUTUAL CONSENT.

MAJOR CHANGES REQUIRE PUBLIC HEARING.

ANNUAL COMPLIANCE REVIEW REQUIRED.

Default & Remedies

- Legal action permitted.
- Specific performance enforcement.
- Attorney fees recoverable.
- Jurisdiction: Burke County Superior Court.

Next Steps:

Approve development agreement terms and conditions – set public hearing for October Commissioner meeting

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

FINANCE - COMMUNITY DEVELOPMENT BLOCK GRANT FOR INFRASTRUCTURE IMPROVEMENTS

Brian Epley, County Manager, provided an update on the County's application for $15 million in Community Development Block Grant–Disaster Recovery (CDBG-DR) Community Infrastructure funding through the North Carolina Department of Commerce, Division of Community Revitalization, for improvements to the Indian Hills Pump Station. He explained that the grant requires no local match and that the Board previously approved a resolution authorizing the County to apply. The next step is to conduct a public hearing to receive citizen comments on the proposed project and funding application. Mr. Epley noted that the grant requires the project to benefit a minimum of 10% low-income residents and that the Indian Hills service area meets this eligibility threshold. Following the public hearing, the Board will consider the required application documents, including the Citizen Participation Plan, Residential Anti-Displacement and Relocation Assistance Plan, and resolution authorizing submission of the application.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CONSENT AGENDA

CM - PROPOSED UPDATES TO WPCOG CHARTER AND BYLAWS

Hugh Sandoe, Budget Strategy and Performance Analyst, presented proposed amendments to the Western Piedmont Council of Governments (WPCOG) Charter and Bylaws intended to modernize and clarify the organization's governance structure. Key revisions include changing certain voting requirements from a two-thirds majority to a simple majority, formally clarifying WPCOG's authority to serve as a regional public housing authority, eliminating the Treasurer and Secretary officer positions in favor of at-large Executive Committee members, recognizing staff Clerk to the Board and Finance Officer positions, and making minor administrative and language updates. Mr. Sandoe explained that each member of government has been asked to review and approve the proposed amendments before WPCOG takes final action.

Commissioner Burns, who serves as Chairman of WPCOG, explained that the revisions are intended to better align the organization's governance structure with local government practices. He noted that WPCOG already performs regional housing authority functions and that the amendments would more clearly establish that authority within its governing documents.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CM- BUDGET AMENDMENT NO. 8- CAPITAL PROJECT CLOSEOUT

Brian Epley, County Manager, requested approval of Budget Amendment No. 8, which recognizes the transfer of $925,000 from Capital Reserve to purchase replacement ZOLL cardiac monitors for Emergency Medical Services (EMS). He reported that the combined Animal Services and EMS Base No. 1 construction projects were completed on schedule and under budget, resulting in approximately $1.3 million in surplus funds returned to Capital Reserve. Mr. Epley explained that the existing cardiac monitors are approaching the end of their service life and will no longer be supported by the manufacturer. Although replacement was originally planned for FY 2028, the availability of surplus funds provides an opportunity to replace approximately 18 monitors simultaneously without requiring additional funding. He noted that EMS leadership recommended against phased replacement due to equipment compatibility concerns and potential patient care risks associated with operating different monitor systems. Mr. Epley stated that the replacement monitors are expected to provide 15 to 20 years of service.

Chairman Brittain opened the floor for questions or comments. Commissioner Stroud expressed appreciation for the project savings and their use toward needed emergency equipment. Mr. Epley noted that cardiac monitor prices had increased from approximately $45,000 to over $60,000 per unit in the past year, making timely replacement integral to offset future inflationary escalations in pricing. Commissioner Stroud encouraged continued efforts to achieve similar savings through local contractors.

There being no further discussion, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CM - BUDGET AMENDMENT NO. 9- ADDITIONAL STATE FUNDING FOR ADULT SERVICES CLIENTS IMPACTED BY HURRICANE HELENE

Brian Epley, County Manager, requested approval of Budget Amendment No. 9, which recognizes additional State funding being distributed to counties to assist Adult Services clients impacted by Hurricane Helene. Funding will be used based on individual assessments conducted by Adult Social Services workers to address essential needs, including medical and personal care, food and clothing, household necessities, housing assistance and repairs, and utility expenses.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CM - BUDGET AMENDMENT NO. 10 — SHERIFF'S OFFICE GRANTS

Brian Epley, County Manager, requested approval of Budget Amendment No. 9, which recognizes two (2) public safety grants from the State. Mr. Epley explained that the first is a $450,000 direct legislative appropriation for the Sheriff's Office to purchase a BearCat armored tactical vehicle, which has an anticipated two (2) year delivery timeline. The second is a $55,000 grant from the North Carolina Department of Public Safety to purchase Motorola VIPER radios as part of the County's ongoing radio replacement schedule, reducing the need for local funding. Neither allocation requires a local match.

Chairman Brittain opened the floor for questions or comments and asked Sheriff Hinceman about

the intended use of the BearCat armored vehicle. Sheriff Hinceman explained that it would provide ballistic protection for deputies and SWAT personnel during high-risk situations, including armed standoffs, warrant service, and manhunts. He noted that the Sheriff's Office currently lacks an armored vehicle and has relied on neighboring counties and the State Bureau of Investigation for similar equipment. He emphasized the importance of officer safety, citing previous incidents involving deputies exposed to gunfire.

There being no further discussion, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CLERK - APPOINTMENT TO LEPC ADVISORY BOARD

Morgan Buchanan, Clerk to the Board of Commissioners, explained that the Local Emergency Planning Committee works on planning responses and general safety measures dealing with hazardous materials. This committee works hand-in-hand with emergency response agencies, businesses, industrial organizations, and the general public. The committee currently has a vacancy for Seat No. 16 — At Large. An application has been received from Brenda Campbell to serve this role.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

CLERK - APPOINTMENT TO JCPC ADVISORY BOARD

Morgan Buchanan, Clerk to the Board of Commissioners, stated that the purpose of the Juvenile Crime Prevention Council is to assess the needs of at-risk youth in Burke County, giving particular attention to the offenders on a continuing basis. They also assist the county in planning delinquency prevention programs and recommending community-based alternatives to becoming involved in the justice system. Finally, they evaluate programs receiving community-based alternative funds or recommend new programs for JCPC funds to meet the continued need. An application has been received from Chazlyn Thomas to serve as Seat No. 7—Social Services Designee.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

TAX - TAX RELEASE AND REFUND REPORT FOR PERIOD ENDING SEPTEMBER 30, 2026

Travis Isaacs, Tax Administrator, submitted the Tax Release and Refund Report for the period ending September 30, 2026, to the Board, which reads as follows:

Tax System Refunds and Releases			
Report Amount	Rebilled Amount	Net Release	Refund Amount

$65,858.28	$59,273.19	$6588.45	$0.00

VTS Refunds Over $100	
	Refund Amount
VTS Adjustments	$449.08

Note: The net release amount results from the reported amount minus the rebilled amount.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT: MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.

TAX - TAX COLLECTION REPORT FOR PERIOD ENDING SEPTEMBER 30, 2026

Travis Isaacs, Tax Administrator, submitted the Tax Collection Report for the period ending September 30, 2026, to the Board, which reads as follows:

Year-to-Date Revenue Collections				
	Budget	Actuals to Date	% Collected	$ Remaining
Current Year Taxes	$65,587,042	$35,762,557	54%	$26,824,484
Discounts	($350,000)	($344,0080		
Delinquent Taxes	$700,000	$373,974	53%	$326,026
Interest and Fees	$329,000	$50,000	15%	$278,764
Total	$61,174,871	$36,186,747		

Total Levy For 2026-2027 Tax Year				
	Current Year Amended Levy	Current Year Collected	% Collected	$ Remaining
Property Taxes	$57,319,903	$35,570,306	62%	$23,037,355
Motor Vehicle Taxes	$5,456,857	$1,775,053	32%	$3,681,804
Fire Tax	$80,078,008	$5,009,774	63%	$3,032,319

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT: MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.

ITEMS FOR DECISION

FM - APPROVAL OF BURKE COUNTY FOR THE ISSUANCE OF TAX-EXEMPT DEBT OBLIGATIONS BY OAK HILL FIRE AND RESCUE PROTECTION ASSOCIATION, INC.

Brian Epley, County Manager, presented a request from Oak Hill Fire and Rescue Protection Association, Inc. for a revenue confirmation letter in connection with proposed tax-exempt financing of up to $1.1 million through HomeTrust Bank to purchase a pumper truck and a pumper/tanker truck. Mr. Epley explained that the bank requires a letter signed by the Board Chairman confirming the County's intent to continue levying the fire district tax and funding the department as its source of debt repayment. The equipment would remain owned and operated by Oak Hill Fire and Rescue, with no financial obligation to the County. He noted that the department would hold a public hearing and that Chief Winters would attend the regular meeting to answer questions.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

FM - APPROVAL OF BURKE COUNTY FOR THE ISSUANCE OF TAX-EXEMPT DEBT OBLIGATIONS BY LAKE JAMES FIRE AND RESCUE, INC.

Brian Epley, County Manager, presented a request from Lake James Fire and Rescue, Inc. for a revenue confirmation letter in connection with proposed tax-exempt financing of up to $483,265 through HomeTrust Bank to purchase a Quick Attack Fire Truck. Mr. Epley explained that the Board is being asked to reaffirm its funding commitment to the department over the life of the loan. The equipment would remain owned and operated by Lake James Fire and Rescue, with no financial obligation to the County. He noted that their treasurer, Ken Corn, would attend the regular meeting to answer questions.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

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RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

TA - APPROVAL OF 2027 SCHEDULE OF VALUES AND PRESENT USE SCHEDULE OF VALUES

Travis Isaacs, Tax Administrator, stated that he will present the proposed 2027 Schedule of Values, which establishes the appraisal methods, rates, adjustments, and procedures that will be used to value real property as part of Burke County's January 1, 2027, reappraisal, at the Board's regular meeting. The presentation will provide an overview of the Schedule of Values, current market conditions, valuation methodologies, appraisal standards, and the process for property owner review and appeals. At that time, he will request that the Board schedule the required public hearing for their November meeting.

Chairman Brittain opened the floor for questions or comments; there being none, this item was moved without objection to the next meeting.

RESULT:	**MOVED WITHOUT OBJECTION TO THE NEXT MEETING ON OCTOBER 19, 2026, AT 6:00 P.M.**

REPORTS AND COMMENTS

Chairman Brittain issued a reminder for some upcoming community events and the next Board of Commissioners meeting. He also invited youth groups to lead the Pledge of Allegiance at future meetings and encouraged faith leaders to contact the Clerk's Office if interested in delivering an invocation. Further, Chairman Brittain noted there are many boards and committees with vacancies, and he encouraged citizens to get involved. Lastly, he reminded citizens to keep the community clean and report litter in need of cleanup through the County's beautification portal.

RESULT:	**NO ACTION TAKEN.**

OTHER DISCUSSION ITEMS - NONE

ACTION ITEMS

DSS – DEPARTMENTAL UPDATE FOR THE PERIOD ENDING JULY 31, 2026

Korey Fisher-Wellman, DSS Director, presented the DSS departmental update as follows:



OPERATIONS

Economic Services MOU Data

METRICS PER MOU

FOOD AND NUTRITION SERVICES

ACTIVE RECIPIENTS	ACTIVE CASES	MOU MEASURE	98% APP TIMELINESS RATE - REGULAR	98% APP TIMELINESS RATE -EXPEDITE	95% RECERT TIMELINESS RATE
9,719	5,103		Achieved	Achieved	Achieved

WORK FIRST FAMILY ASSISTANCE AND EMPLOYMENT SERVICES

ACTIVE RECIPIENTS	ACTIVE CASES	MOU MEASURE	95% APPLICATION TIMELINESS	95% RECERT TIMELINESS RATE
84	51		Achieved	Achieved

MEDICAID

TOTAL MEDICAID RECIPIENTS	ACTIVE CASES	MOU MEASURE	90 REPORT CARD MAD	90 REPORT CARD OTHER	95 Straight Through Processing
27,984	22,939		87%-rebuttal sent	Achieved	Achieved

SPECIAL ASSISTANCE

MOU PERFORMANCE MEASURE			85%	85%
SA ACTIVE CASES			SAA TIMELINESS APPLICATIONS	SAD TIMELINESS APPLICATIONS
254			Achieved	Achieved

ENERGY PROGRAMS

MOU PERFORMANCE MEASURE			98%	98%
	CIP APPLICATIONS PROCESSED	LIEAP APPLICATIONS PROCESSED	% PROCESSED TIMELY -NO SOURCE 1 DAY	% PROCESSED TIMELY -WITH SOURCE 2 DAYS
	290	0	Achieved	Achieved

CHILD CARE SUBSIDY

PERFORMANCE MEASURE	95%
ACTIVE CASES	APPLICATION TIMELINESS
360	Achieved

Economic Services Update

MEDICAID

	AGED OR DISABLED ADULT ACTIVE PARTICIPANTS Does not include MXP or FP cases	ADULT ACTIVE CASES *Does not include MXP or FP cases	FAMILY AND CHILDREN ACTIVE PARTICIPANTS	FAMILY AND CHILDREN ACTIVE CASES	TOTAL MEDICAID APPLICATIONS TAKEN	TOTAL MEDICAID REVIEWS	TOTAL MEDICAID REVIEWS WITHOUT WAIVERS	CAP REFERRALS	LTC REFERRALS	TOTAL MEDICAID RECIPIENTS	TOTAL NEMT TRIPS	REPORT CARD MAD	REPORT CARD OTHER	RECERT COMPLETION TIMELINESS RATE	Straight Through Processing	Total
MOU MEASURE												90	90	95		
AUG	5283	7,753	23448	15,418	325	1386		1	12	28,731	823	100%	96%		100%	96%
SEP	5289	7,744	23471	15,459	378	1586		2	16	28,740	756	100%	94%		100%	94%
OCT	5311	7,747	23422	16,290	398	1606		1	16	28,733	638	100%	98%		100%	98%
NOV	5342	7,755	23,381	15,465	472	1825		2	12	28,723	624	100%	96%		100%	97%
DEC	5313	7,761	23,324	15,542	560	1890		3	15	28,637	832	100%	95%		100%	96%
JAN	5319	7,748	23194	15,527	531	503		2	19	28,513	606	100%	93%		100%	93%
FEB	5318	7,781	23123	15,439	405	1893		2	10	28,441	809	100%	87%		100%	88%wa
MAR	*	7,826	*	15,420	504	1767		3	11	28,446	933	90%	94%	*	100%	94%
APR	5368	7,836	22876	15,301	413	1651		5	20	28,246	849	92%	95%	*	100%	94%
MAY	5369	7,791	22750	15,224	456	1423		2	15	28,121	910	100%	94%	*	100%	94%
JUN	5389	7,770	22532	15,170	461	1337		2	10	27,925	986	100%	95%	*	100%	95%
JUL	5387	7,798	22,596	15,136	467	1239		0	20	27,923	975	100%	95%	*	100%	95%
AUG	5387	7,793	22,596	15,146	442	1217		1	15	27,984	877	87%	96%	*	100%	96%

Economic Services Update

FOOD AND NUTRITION SERVICES

	ACTIVE RECIPIENTS	ACTIVE CASES	APPLICATIONS TAKEN	APP TIMELINESS RATE-REGULAR	APP TIMELINESS RATE-EXPEDITE	RECERT TIMELINESS RATE	RECERTS COMPLETED	FNS EBT BENEFITS
MOU MEASURE				95%	95%	95%		
AUG	10,783	5602	558	99.52%	99.31%	98.86%	528	1,778,789.00
SEP	10,794	5605	580	99.13%	97.98%	99.41%	509	1,752,253.00
OCT	10,695	5568	512	99..07%	99.02%	98.65%	445	1,797,705.00
NOV	10,418	5445	417	99.15%	98.81%	99.70%	336	1,759,731.00
DEC	10,269	5389	479	100.00%	100%	99.36%	336	1,721,688.20
JAN	10,112	5307	505	96%	99.09%	97.51%	482	1,662,857.00
FEB	9,992	5228	542	100.00%	98.15%	98.15%	432	1,645,153.00
MAR	9,889	5197	543	98.45%	99.28%	99.21%	505	1,647,954.00
APR	9,805	5142	500	99.45%	97.98%	99.49%	587	1,618,144.00
MAY	9,754	5091	540	100.00%	100.00%	99.00%	564	1,645,145.00
JUN	9,735	5,082	572	98.59%	98.98%	98.01%	569	1,635,049.00
JUL	9,792	5,131	524	99.14%	99.07%	99.36%	467	1,651,828.00
AUG	9,719	5103	530	98.75%	97.39%	99.36%	468	1,654,188.00

ADULT SERVICES UPDATE



Guardianship
- Total Wards: 85
- Contracted Wards: 17

SAIH (Special Assistance In-Home)
- Active Cases: 77
- State Average Caseload: 25-30

CAP (Community Alternatives Program)
- Current Enrollment: 120
- Waiting list for CAP: 37

August APS Data

Category	Number	Notes
Total APS Reports Received	52	
APS Reports Screened In	22	Reports meeting criteria for an investigation
Substantiated Cases	0	
Confirmed Cases	4	Includes substantiations and other confirmations
Cases Opened for Services	2	Ongoing support and case management
Outreach Cases Assigned	10	Proactive engagement with at-risk adults
Service Referrals	7	Referrals for supportive community services
Guardianship Referrals	12	Referrals for potential legal guardianship

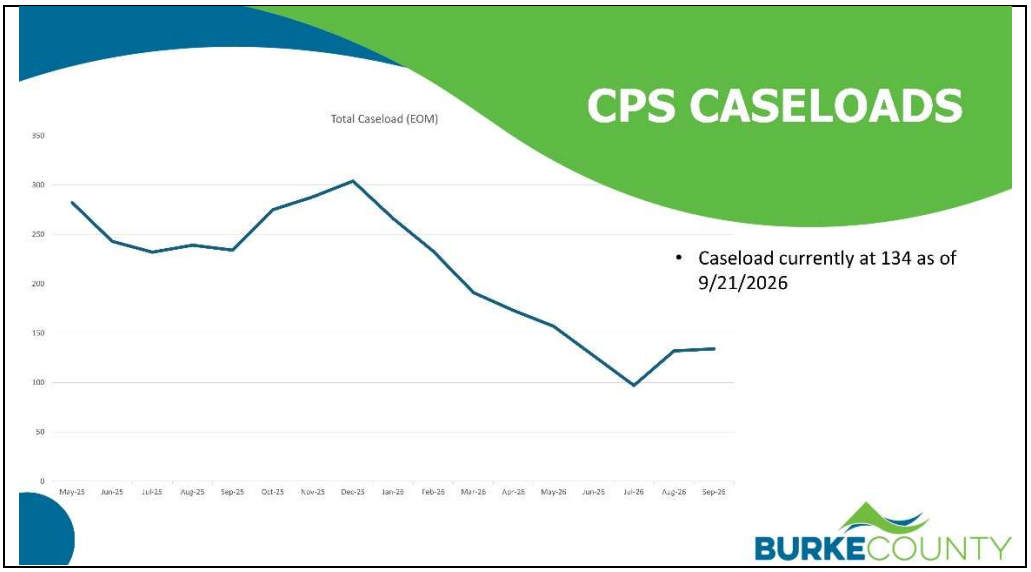
BURKECOUNTY

CPS Reports



- September projected to end with 60+ reports
- August reports eclipsed previous three months

BURKECOUNTY



Mr. Fisher-Wellman also provided an update on the County's partnership with Black Mountain, reporting that the contract has been fully executed and several initiatives were underway prior to its execution. Two (2) Burke County families participated in the August 3rd Model Approach to Partnerships in Parenting training class for prospective foster parents, with another class scheduled for October 19th. At least five (5) additional families have expressed interest, and outreach efforts have included a meeting with representatives from approximately 17 local churches and planned engagement with school principals and counselors. He also reported that the behavioral health provider, Anuvia, has been conducting virtual assessments to assist with timely placement of children and will eventually provide on-site clinical support. The first parenting class cohort was also scheduled to begin. Mr. Fisher-Wellman expressed optimism about continued growth in participation and services as the partnership progresses.

Chairman Brittain opened the floor for questions or comments; there being none, he called for a motion.

Motion: To accept the August 2026 DSS report as presented.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Randy Burns, Commissioner
AYES:	Jeffrey C. Brittain, Brian Barrier, Randy Burns, and Mike Stroud
ABSENT:	Phil Smith

ADJOURN

Motion: To adjourn the meeting at 4:06 p.m.

RESULT:	**APPROVED [UNANIMOUS]**
MOVER:	Mike Stroud, Commissioner
AYES:	Jeffrey C. Brittain, Brian Barrier, Randy Burns, and Mike Stroud
ABSENT:	Phil Smith

Approved this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

PRESENTATIONS

Subject Title: **CM - Recognition for 2026 Fall Citizens Academy**

Presented by: **Brian Epley, County Manager**

Summary of Information: This is an opportunity to recognize the Fall 2026 Citizens Academy participants.

Strategic Plan Focus Area Alignment:
No. 1- Community Advancement
To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Not Applicable

Legal Review: Not Applicable

Suggested Motion: Recognize the 2026 Fall Citizens Academy participants, present them with a gift, and then take a commemorative photo.

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

PRESENTATIONS

Subject Title: **BCCOC- Proclamation declaring October 21, 2026 National Chamber of Commerce Day**

Presented by: **Tonia Stephenson**

Summary of Information: Support Your Local Chamber of Commerce Day is observed annually on the third Wednesday in October to recognize the important role chambers of commerce play in supporting businesses, strengthening local economies, and fostering community partnerships. The Burke County Chamber of Commerce has served as a trusted resource for local, regional, and national businesses and their employees since 1945. The proclamation recognizes October 21, 2026, as Support Your Local Chamber of Commerce Day in Burke County and highlights the Chamber's continued commitment to *Growing Business. Building Community.*

Strategic Plan Focus Area Alignment:
Not Applicable

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To approve Proc. 2026-13 Support Your Local Chamber of Commerce Day as presented.

BURKE COUNTY
NORTH CAROLINA

PROCLAMATION
NATIONAL SUPPORT YOUR LOCAL CHAMBER OF COMMERCE DAY
OCTOBER 21st 2026

WHEREAS, chambers of commerce play an important role in strengthening local economies by supporting businesses, encouraging entrepreneurship, fostering collaboration, and promoting opportunities for economic growth; and

WHEREAS, chambers of commerce serve as trusted resources and advocates for the business community, bringing together businesses, community leaders, organizations, and residents to address shared challenges and pursue opportunities that enhance the quality of life within their communities; and

WHEREAS, strong local businesses contribute to a thriving community by creating jobs, investing in the local economy, supporting community initiatives, and providing goods and services that benefit residents throughout the county; and

WHEREAS, the Burke County Chamber of Commerce has served as a trusted resource for local, regional, and national businesses and their employees since 1945, strengthening connections and promoting opportunities throughout Burke County; and

WHEREAS, through partnerships, programs, advocacy, leadership development, and support for businesses of all sizes, the Burke County Chamber of Commerce continues its mission of *Growing Business. Building Community.*; and

WHEREAS, Support Your Local Chamber of Commerce Month provides an opportunity to recognize the important role the Burke County Chamber of Commerce and its members play in strengthening our local economy and building a vibrant and connected community;

NOW, THEREFORE, BE IT PROCLAIMED that the Burke County Board of Commissioners hereby recognizes October 21st 2026 as

SUPPORT YOUR LOCAL CHAMBER OF COMMERCE DAY

in Burke County and encourages residents to learn more about the Burke County Chamber of Commerce, support local businesses, and recognize the contributions of the businesses, organizations, and individuals working together to strengthen Burke County.

Approved this 19th day of October, 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

SCHEDULED PUBLIC HEARINGS

Subject Title: **C-PACE- Public Hearing and Consideration of C-PACE Program Participation**

Presented by: **Kristin Bunn**

Summary of Information: The Board of Commissioners previously adopted a Resolution of Intent to participate in North Carolina's Commercial Property Assessed Capital Expenditure (C-PACE) Program. C-PACE is a voluntary statewide program that allows eligible commercial property owners to obtain private, long-term financing for qualifying improvements, including energy efficiency, water conservation, renewable energy, and resiliency projects.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To adopt Resolution No. 2026-22 authorizing Burke County, North Carolina, to join and participate in the Commercial Property Assessed Capital Expenditure (C-PACE) Program.
or
To deny Resolution No. 2026-22 authorizing Burke County, North Carolina, to join and participate in the Commercial Property Assessed Capital Expenditure (C-PACE) Program.

ECONOMIC DEVELOPMENT PARTNERSHIP of NORTH CAROLINA

C·PACE

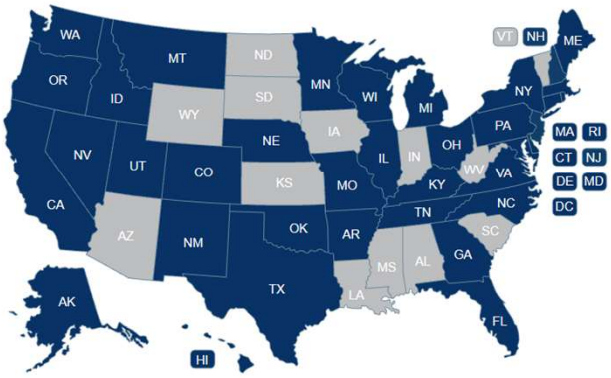
Commercial Property Assessed Capital Expenditure Program

1

US Participation in C-PACE

(C-PACE) financing is available in states after legislation is passed and adopted on the local level.

While each C-PACE program is unique, NC's program includes energy efficiency and renewable measures but also investment in resiliency and water conservation.



2

North Carolina C-PACE Program Participants



3

Commercial Property Assessed Capital Expenditure

SB 802 became law in 2024, creating a statewide Commercial Property Assessed Capital Expenditure (C-PACE) program.

Private property owners can apply for private financing of eligible capital expenditures, leveraging a new financial mechanism – the C-PACE Assessment and the C-PACE Lien

Loans and the assessments are secured by liens placed on the property by the participating local government, enabling payback periods over the expected life of the improvements

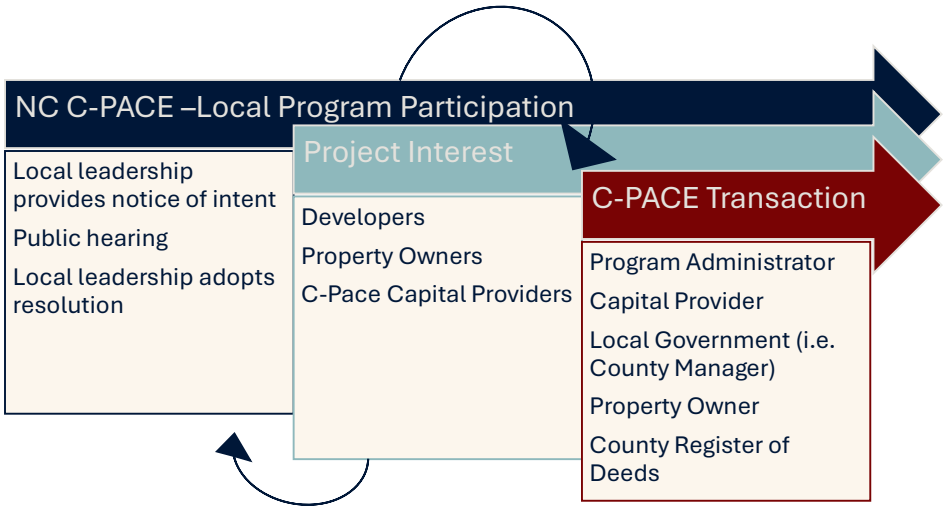
4

Expanding the Toolbox

- Provides an additional financing tool for property owners to use "private funds" to finance improvements to their eligible property.
- Drives economic development - by creating a diversity of jobs in the resilience and clean energy sectors of the economy.
- Provides a more accessible financial mechanism to fund improvements.
- The assessment and resulting improvements will increase the tax value of the affected properties with minimal administrative cost to local governments.

5

C-PACE Overview



6

Qualifying Improvements

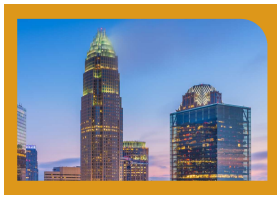
Permanently affixed improvements on qualifying commercial property as part of construction or renovation, including one ore more of the following:

- **Energy efficiency measure** - equipment, component, or program change that reduces energy use and that meets or exceeds then-existing State and Federal building codes and efficiency standards or conservation codes.
- **Resiliency measure** - equipment, component, or program change including, but not limited to, storm retrofits, flood mitigation, stormwater management
- **Renewable energy measure** - equipment, component, or program change that utilizes a renewable energy resource.
- **Water conservation measure** - equipment, component, or program change to decrease water consumption or demand, either indoor or outdoor. This also includes measures to address safe drinking water.

7

Qualifying Commercial Property

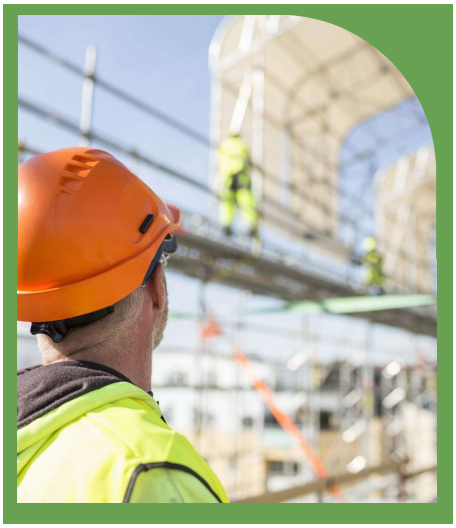
- Privately-owned property:
  - Commercial
  - Industrial
  - Agricultural
  - Multi-family real property with five (5) or more dwelling units.
  - This includes properties owned by nonprofit, charitable, or religious organizations.





8

C-PACE : Flexible Financing



- Acquisition
- Construction (including new construction)
- Adaptive reuse
- Installation, or modification of qualifying improvements
- Refinancing of existing properties or new construction that have had qualifying improvements installed

9

NC's 1st C-PACE Project



Summary

Trenton Mill Lofts is an 85-unit multifamily development located in downtown Gastonia, NC, approximately 20 miles west of Charlotte. The building was previously Trenton Cotton Mill, Gastonia's oldest standing textile mill, which was built in 1897 and had since stood abandoned. In 2022, the Sponsor, Lansing Melbourne Group, reimagined and converted it to an upscale multifamily property, which boasts design-forward apartments and loft-style homes, as well as a fitness studio, lounge, hammock park and fire pit area.

Opportunity

The sponsor utilized $6.5 million in C-PACE financing to recapitalize key energy efficiency improvements, as well as associated soft costs, which were made to the historic Trenton Mill as part of a 2022 adaptive reuse project. By utilizing C-PACE, the Sponsor was able to partially pay down their original construction loan and support the stabilization of the property. This enabled them to cover necessary reserves, enforce lease-up efforts, and fund operational enhancements, thereby positioning the property for long-term success, while providing the city of Gastonia with needed housing.

10

Local Government Benefits

C-PACE is an economic development tool structured to be cost-neutral for local governments and requiring little-to-no administrative resources. By making it more affordable for building owners to make major improvements to their buildings, local building stock is enhanced, which drives job creation. Energy and resiliency upgrades retain and attract new businesses by lowering utility costs, and in turn these upgrades generate higher property tax payments for local governments. In addition to supporting local governments in their efforts to achieve energy and emissions reduction goals, the benefits of the C-PACE program include:

- Higher property values – Revitalized buildings improve property values, creating more revenue for local communities.
- Economic growth – New development and construction projects stimulate the local economy.
- Stronger communities – Conserving resources and building resiliency in infrastructure deliver positive impacts for everyone in the community.

11

No Overhead

- A local government shall **NOT be financially or legally liable** for any actions taken pursuant to the C-PACE Act. § 160A-239.16. (a)
- The C-PACE program is structured to be cost-neutral for local governments and requires **little-to-no administrative resources**.
- At closing and upon execution by the local government, EDPNC or the capital provider will record the Assessment Agreement, Notice of C-PACE Assessment, and the Assignment of C-PACE Lien in the office of the register of deeds in the county in which the property is located.
- C-PACE assessment is a voluntary assessment imposed on a commercial property by a local government under pursuant to an assessment agreement for the **total amount of the C-PACE financing**. **The voluntary C-PACE assessment shall not constitute a tax.**
- C-PACE liens are **junior in priority to all taxes** and other governmental liens. § 160A-239.17.1
- Outstanding or delinquent state, local, or federal taxes or liens at the time of a foreclosure proceeding will be satisfied first. § 160A-239.16. (d)
- **Billing, collection and enforcement** of C-PACE assessments and C-PACE liens will be the sole **responsibility of capital providers**. Local governments are not responsible for collection; duties for billing and collection will be delegated to and handled privately by the capital provider(§160A-239.16 (b)).
- Per the Act, the State nor any local government may use public funds to finance or repay C-PACE assessments, and all financing is obtained by commercial property owners from private-sector capital providers.

12

Your C-PACE Team

Our Role:

- Enablement & education
- Liaison with property owners, local governments, capital providers
- C-PACE Administrator & application review



Kristin Bunn
C-PACE Program Administrator
EMAIL kristin.bunn@edpnc.com
PHONE 919.634.1647



Larry Price
Director of Finance
EMAIL larry.price@edpnc.com
PHONE 919.447.7807

13

RESOLUTION AUTHORIZING BURKE COUNTY, NORTH CAROLINA TO PARTICIPATE IN THE COMMERCIAL PROPERTY ASSESSED CAPITAL EXPENDITURE (C-PACE) PROGRAM

WHEREAS, as required by N.C. Gen. Stat. § 160A-239.14(a)(1), the Board of Commissioners, of Burke County, North Carolina (the County) previously adopted Resolution No. 2026-18 (the "Resolution of Intent"), declaring the intent of the County to participate in the Commercial Property Assessed Capital Expenditure (C-PACE Program) established under Article 10B of Chapter 160A of the General Statutes of North Carolina, as amended (the "C-PACE Act"); and

WHEREAS, as required by N.C. Gen. Stat. § 160A-239.14(b), on October 19, 2026, the County held a public hearing on its intent to participate in the C-PACE Program; and

WHEREAS, as required by N.C. Gen. Stat. § 160A-239.14(a)(2), the County now desires to adopt a resolution to join the C-PACE Program;

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of Burke County, North Carolina as follows:

Section 1. The County hereby joins the C-PACE Program and declares that its participation in the C-PACE Program shall be subject to and consistent with the provisions of the C-PACE Act, the terms of the C-PACE Program as established by the Economic Development Partnership of North Carolina as the Statewide Administrator of the C-PACE Program, and the Resolution of Intent.

Section 2. Nothing in this resolution shall be interpreted as authorizing the [City/County] to pledge, offer, or encumber its full faith and credit, and the County shall not pledge, offer, or encumber its full faith and credit in connection with any C-PACE Financing.

Section 3. Should any provision or provisions of this Resolution be declared invalid or unenforceable in any respect by final decree of any court of competent jurisdiction, the invalidity or unenforceability of any such provisions shall not affect the remaining provisions of such Resolution.

Section 4. All resolutions or parts thereof in conflict herewith are, to the extent of such conflict, hereby repealed.

Section 5. This Resolution shall take effect in Burke County upon its adoption.

* * * * * * *

ADOPTED AND APPROVED this 19th day of October, 2026.

* * * * * * *

I, Morgan Buchanan, Clerk to the Board of Commissioners for the County of Burke, North Carolina, DO HEREBY CERTIFY that the foregoing is a true and complete copy of a resolution adopted by the Board of Commissioners of Burke County at a regular meeting duly called and held on October 19, 2026.

WITNESS my hand and the official seal of the Burke County this 19th day of October, 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

ATTEST:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

THE NEWS HERALD

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LEGALS

Legal Notices

BURKE COUNTY BOARD OF COMMISSIONERS NOTICE OF PUBLIC HEARINGS OCTOBER 19, 2026

The Burke County Board of Commissioners will hold a public hearing at 6:00 p.m. or as soon as public comments can be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following matters:

Development Agreement – Clover Ridge Subdivision
Parties: Burke County, City of Morganton, and Western Carolina Developers, LLC
Property: PINs 1794175470 and 1794175020
Location: City of Morganton

A public hearing will be conducted on a proposed development agreement for the Clover Ridge Subdivision

The proposed development agreement governs a phased residential development anticipated to include approximately 25 single-family lots. A copy of the proposed development agreement is available for public inspection in the office of the Clerk to the Board of Commissioners, 200 Avery Avenue, Morganton, NC, and online at www.burkenc.org.

Questions regarding the development agreement may be directed to the County Manager's Office at 828-764-9350. If a reasonable ADA accommodation is needed to participate in the public meeting, please contact the County Manager's Office by October 16, 2026, at 828-764-9350.

Publish: October 8 and October 15, 2026

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

Notice is hereby given that the Burke County Board of Commissioners will hold a public hearing at 6:00 p.m., or as soon thereafter as the matter may be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St., Morganton, NC (Door E), regarding Burke County's proposed participation in the North Carolina Commercial Property Assessed Capital Expenditure (C-PACE) Program.

The North Carolina C-PACE Program is a statewide program that allows eligible owners of qualifying commercial properties to obtain private financing for qualifying improvements, including energy efficiency, renewable energy, resiliency, and water conservation improvements. C-PACE financing is secured through a voluntary assessment and lien on the qualifying property.

The Burke County Board of Commissioners previously adopted a Resolution of Intent on September 21, 2026 declaring the County's intent to participate in the North Carolina C-PACE Program. Following the public hearing, the Board may consider adoption of a resolution authorizing Burke County to join the C-PACE Program.

Interested persons are invited to attend the public hearing and provide comments regarding Burke County's proposed participation in the C-PACE Program.

If reasonable ADA accommodations are needed to participate in the public hearing, please contact the County Manager's Office at 828-764-9350 by October 16, 2026.

Publish: October 8 and 15, 2026.

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

The Burke County Board of Commissioners will hold two public hearings at 6:00 p.m. or as soon as public comments can be heard, on October 19th, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following zoning-related matters:

Zoning Map Amendment - ZMA 2026-04
Request: Request to rezone a parcel of land from the Residential Three (R-3) District to the General Business (G-B) District
Applicant: Bryson Carlton
Property: PIN 1791162409
Address: 2763 US 64, Morganton NC, 28655, Burke County

Zoning Map Amendment - ZMA 2026-05
Request: Request to rezone a parcel of land from the Residential Two (R-2) District to the General Business (G-B) District
Applicant: Chad Huffman
Property: PIN 2762852471
Address: 7857 Old NC 10, Hickory NC, 28602, Burke County

Questions regarding these matters may be directed to the Community Development Department at 828-764-9030. If reasonable ADA accommodations are needed to participate in the public hearings, please contact the County Manager's office by October 16th, 2026, at 828-764-9350.

Publish: October 8 and 15, 2026.

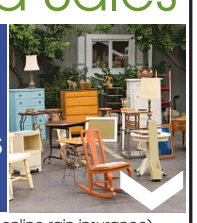


TRIPLE COMMUNITY FIRE DEPT., INC. NOTICE OF BUDGET MEETING

Triple Community Fire Department's budget meeting, scheduled for Oct. 20th at 6:30PM. The meeting will take place at the fire department, located at 505 Mountain View Drive in Morganton.
Publish: Oct. 3, Oct. 10, Oct. 17.

Advertise Your Yard Sales

1 day $29
2 days $39



(Includes online rain insurance)

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LEGALS

Legal Notices

NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that on October 19th, 2026, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), will be held by the Board of Commissioners of the County of Burke, North Carolina (the "County") with respect to the issuance by the Public Finance Authority (the "Authority"), a commission organized under and pursuant to Sections 66.0301, 66.0303, and 66.0304 of the Wisconsin Statutes, of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"). The Authority will loan the proceeds of the Bonds to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Code, to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), including the community located in the County described below, to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds.

The hearing will commence at 6:00 p.m., or as soon thereafter as the matter can be heard, at the County Board Room, 110 North Green Street (Entrance E), Morganton, North Carolina 28655. Notice is being given pursuant to Treasury Regulations Section 1.147(f)-1(d)(4)(iii).

The community located in the County is The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655 (the "Project"). The Project is owned and operated by the Borrower or by a single-member limited liability company of which the Borrower is the sole member. The maximum aggregate principal amount of the Bonds to be issued to finance the acquisition of the Project, together with the other communities comprising the Portfolio, is $115,000,000, of which not more than $25,000,000 is allocable to the financing of the acquisition of the Project. The Bonds are expected to constitute "qualified 501(c)(3) bonds" within the meaning of Section 145(a) of the Code.

The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents. The Bonds will not constitute a debt, liability, or obligation of the County, and the County assumes no financial responsibility for the Bonds by taking the action described in this notice.

The hearing will provide a reasonable opportunity to be heard for persons wishing to express their views on the merits of the issuance of the Bonds and the financing thereby of the Project. All interested parties are invited to present comments at the public hearing.

/s/ MORGAN BUCHANAN
Clerk to the Board of Commissioners
County of Burke, North Carolina

Published: October 8th and 15th , 2026

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in Nebo on Carswell Dr. 23.5 acres, road frontage, fields & woods. Well 23 gal min., septic tank, branch & spring. 828-442-4343 or 828-442-4505

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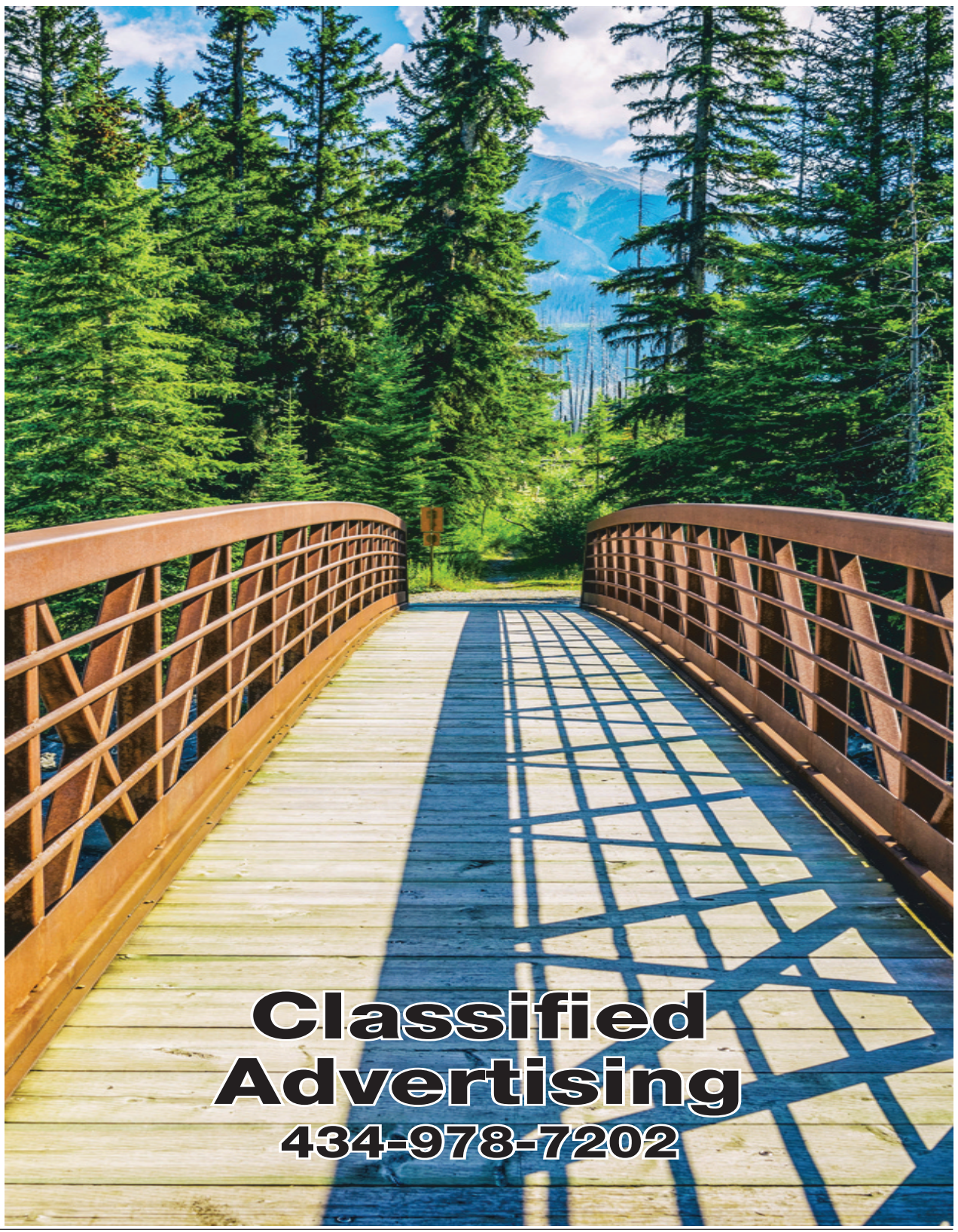

LEGAL NOTICES

Notice to Creditors - Shelba Jean Mull

NORTH CAROLINA, BURKE COUNTY

File No: 26E000807-110

Having qualified as Co-Executor of the Estate of Shelby Jean Mull A/K/A Shelba Jean Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

April Denise Williams, Co-Executor
P.O. Box 1825, Morganton, NC 28680
David Clyde Mull, Co-Executor
P.O. Box 1825, Morganton, NC 28680

Attorney
Daniel Law Firm, P.A.
P.O. Box 1825
Morganton, NC 28680
828-433-0700
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800474

Legals

Casey Winebarger Pope

NORTH CAROLINA, BURKE COUNTY

File No: 26E000779-110

Having qualified as Executor of the Estate of Clay June Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

Gary D. Mull, Executor
115 Searcy Street, Morganton, NC 28655

Attorney
Casey W. Pope
P.O. Box 218
Hickory, NC 28603
828-322-7741
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800475

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Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

SCHEDULED PUBLIC HEARINGS

Subject Title: **CD- ZMA 2026-04, 2763 US 64 Morganton, NC- Zoning Map Amendment & Public Hearing**

Presented by: **Patrick Dickinson, Planner**

Summary of Information: The Community Development Department received a rezoning application (ZMA 2026-04) from Bryson Carlton to rezone a 2.95-acre parcel at 2763 US 64 from Residential-Three (R-3) to General Business (G-B) to establish an automotive tint and vehicle detailing shop. While the request is inconsistent with the "Residential Infill" designation on the Future Land Use Map, planning staff find the rezoning reasonable and in the public interest because it supports economic development along an established highway corridor with access to state-maintained roads and utilities. Following their meeting on August 27, 2026, the Burke County Planning Board voted unanimously (4-0) to recommend approval of the request. Only the applicant's father spoke in support of the project; no other members of the public were present to speak on this matter. The complete staff report, including site analysis, zoning maps, and property photos, is included as an attachment to this agenda packet for review.
N/A

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: N/A

County Manager's Recommendation: Approval is recommended.

Legal Review: The County Attorney’s Office has reviewed the proposed action for compliance with applicable local, state, and federal laws. No legal concerns were identified. All statutory and procedural requirements appear to be met.

Suggested Motion: To adopt Ordinance No. 2026-09 as it relates to ZMA 2026-04 to rezone 2.95 acres at 2763 US 64, PIN 1791162409, from Residential-Three (R-3) to General Business (G-B), adopt the amending ordinance, and amend the Future Land Use Map to General Business. The Board finds that the request is reasonable and in the public interest because it supports economic development along an established state-maintained highway

corridor, provides access to utilities, and is located within 200 feet of existing commercial zoning.

OR

To Deny Ordinance No. 2026-09 as it relates to ZMA 2026-04 to rezone 2.95 acres at 2763 US 64, PIN 1791162409, from Residential-Three (R-3) to General Business (G-B). The Board finds that the request is not reasonable and not in the public interest because it is inconsistent with the 'Residential Infill' designation on the Future Land Use Map and incompatible with surrounding residential uses.

Public Hearing:

Board review of **ZMA-2026-04**

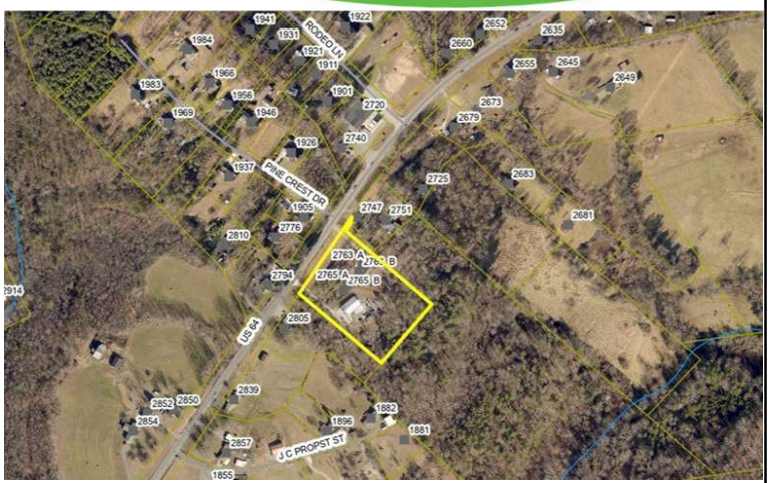
- **Applicant:** Bryson Carlton
- **PIN:** 1791162409
- **Address:** 2763 US 64 Morganton NC 28655
- **Request:** Rezone a single parcel of 2.95 acres ***from*** Residential Two (R-3) ***to*** General Business (G-B)

BURKECOUNTY

1

ZMA 2026-04 Existing Conditions

- The subject parcel is partly cleared and currently hosts a metal garage for personal use.
- It is located within the Salem fire district and Morganton Township.
- Parcel access is provided via US 64, a state-maintained highway.
- This area of the US 64 corridor is a mix of low-density residential and general business land uses.
  - Existing general business zoning (gas station & general store) is located within 200 feet of the parcel.



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ZMA 2026-04 Site Photos







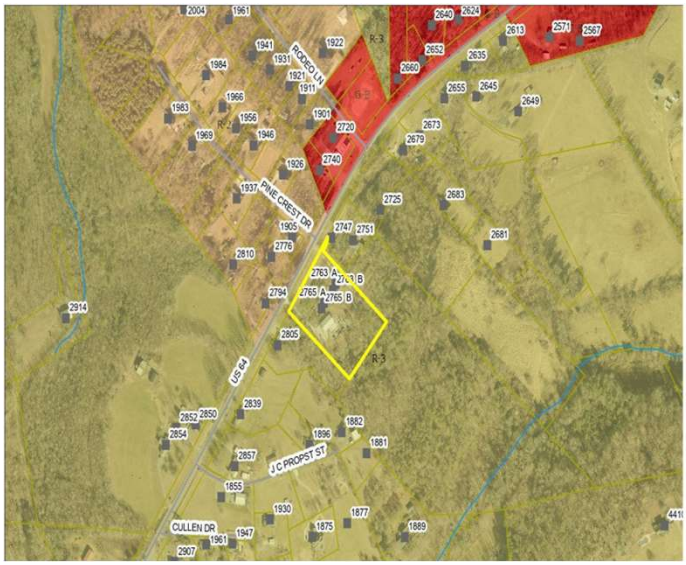


BURKECOUNTY

3

ZMA 2026-04 Current Zoning

- **Current Zoning: Residential Three (R-3)**
  - Broad range of residential uses including Stick Built, Modular, & Class A & B Manufactured Homes, and Duplexes
  - Special uses: Campgrounds, marinas, homeless shelters.
- **Proposed Zoning: General Business (G-B)**
  - Allows most retail, entertainment, and services uses.
  - Special uses: retail larger than 100,000 sqft, adult entertainment, scrapyards.



SEAL OF BURKE COUNTY ORGANIZED 1777 NORTH CAROLINA

ZMA 2026-04
2763 US 64
Morganton NC

County Zoning
- R-1 Residential Low Density
- R-2 Residential Medium Density
- R-3 Residential
- R-MU Rural Mixed Use
- PRMU Planned Residential Mixed-Use
- PRMU Conditional
- CON
- N-B Neighborhood Business
- G-B General Business
- GB Conditional
- O-I Office & Institutional
- OI Conditional
- L-I Light Industrial
- IND Industrial

4

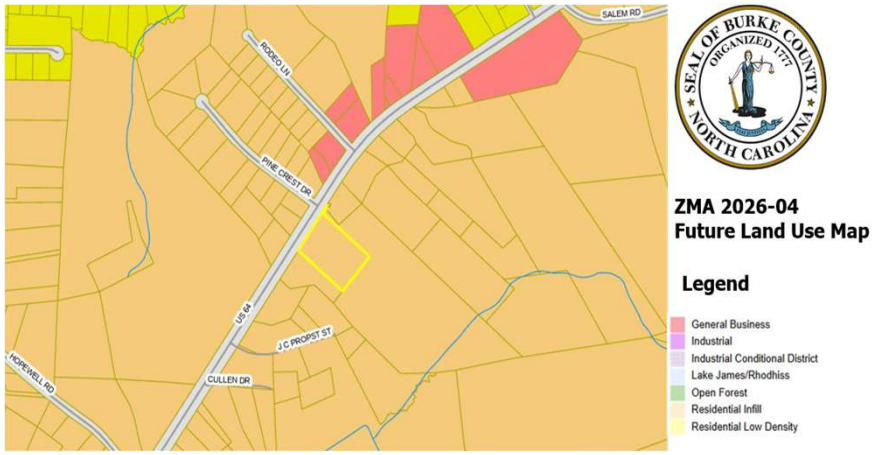
ZMA 2026-04 Future Land Use Map

Current Designation: Residential Infill

- R-2 & R-3 (higher density) zoning.
- Encourages use of single-family stick built or manufactured & multifamily developments.

Proposed Designation: General Business

- Access to major roadways and utilities.
- Residential, commercial, retail, warehouses uses are encouraged.



5

ZMA 2026-04 Staff Findings

Community development staff find the rezoning request **reasonable and in public interest** based on the following:

- The parcel is located along Hwy 64 which provides access to state-maintained roads, utilities and proximity to established commercial uses consistent with Burke County highway corridors.

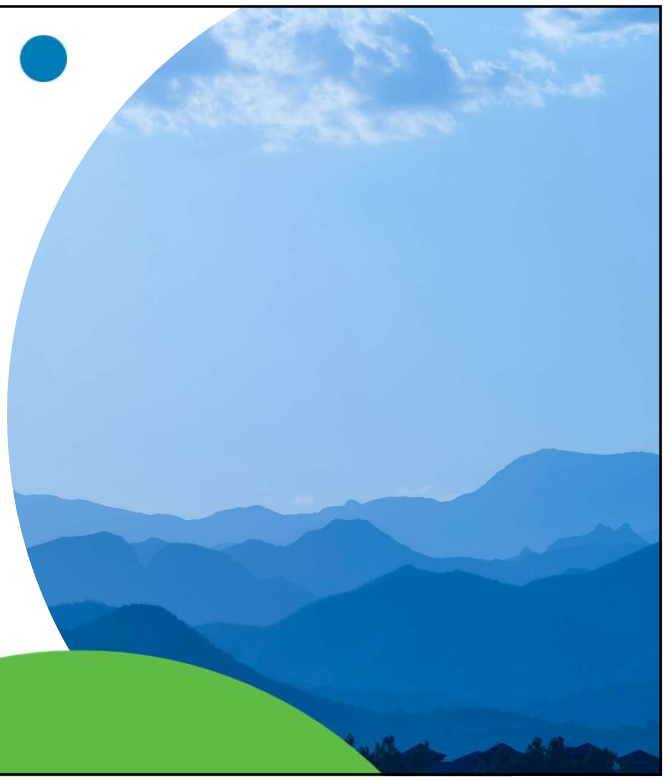
- While the rezoning is not consistent with the Blueprint Burke Strategic Land Use Plan and Land Use Map, it is consistent with its goals to promote economic development along highway corridors with access to utilities and state-maintained roads.

6

BURKECOUNTY

THANK YOU

Questions for staff?



7

Case: ZMA 2026-04

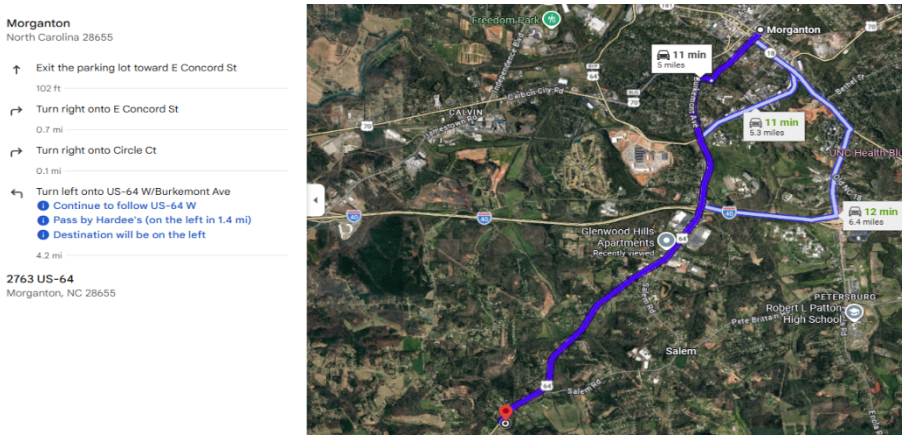
Applicant: Bryson Carlton

PIN: 1791162409

Address: 2763 US 64 Morganton NC 28655

Request: To rezone a single parcel of 2.95 acres ***from*** Residential- Three (R-3) ***to*** General Business (G-B)

Location:



BACKGROUND INFORMATION

Applicant request

The Community Development Dept. has received a rezoning application from Bryson Carlton requesting to rezone a parcel totaling approximately 2.95 acres from the current zoning of Residential- Two (R-3) to General Business (G-B).

The applicant is submitting this request as they are looking to establish a tint shop that would not be allowed by the current zoning district.

SITE ANALYSIS AND SURROUNDING AREA

Current Conditions:

- The subject parcel is partly cleared and currently hosts a metal garage for personal use.
- It is located within the Salem fire district and Morganton Township.
- Parcel access is provided via US 64, a state-maintained highway.

Surrounding Zoning and Land Use:

Direction	Current Zoning	Existing Land Use
North	R-3	Residential
South	R-3	Residential
East	R-3	Residential
West	R-2	Residential

This parcel fronts US HWY 64. This corridor is a mix of low-density residential and general business land uses. Existing general business zoning (gas station / general store) is located within 200 feet of the parcel.

Map 1 : Satellite & Existing Land Use



Site Photos

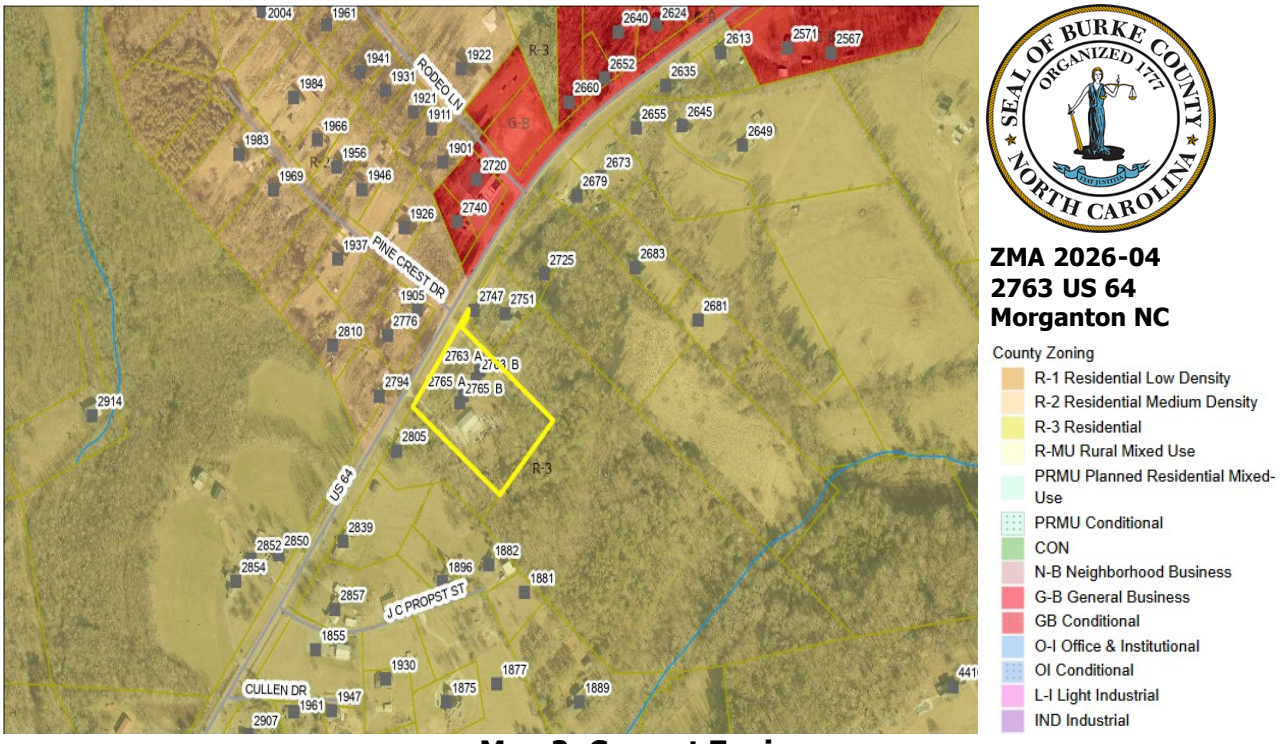

Parcel from HWY 64
BURKE COUNTY
ZONING NOTICE


Across HWY 64


Towards Morganton on HWY 64


Towards Rutherfordton
on HWY 64

ZONING & FUTURE LAND USE CONSIDERATIONS



Map 2: Current Zoning

Current Zoning: Residential Three (R-3)

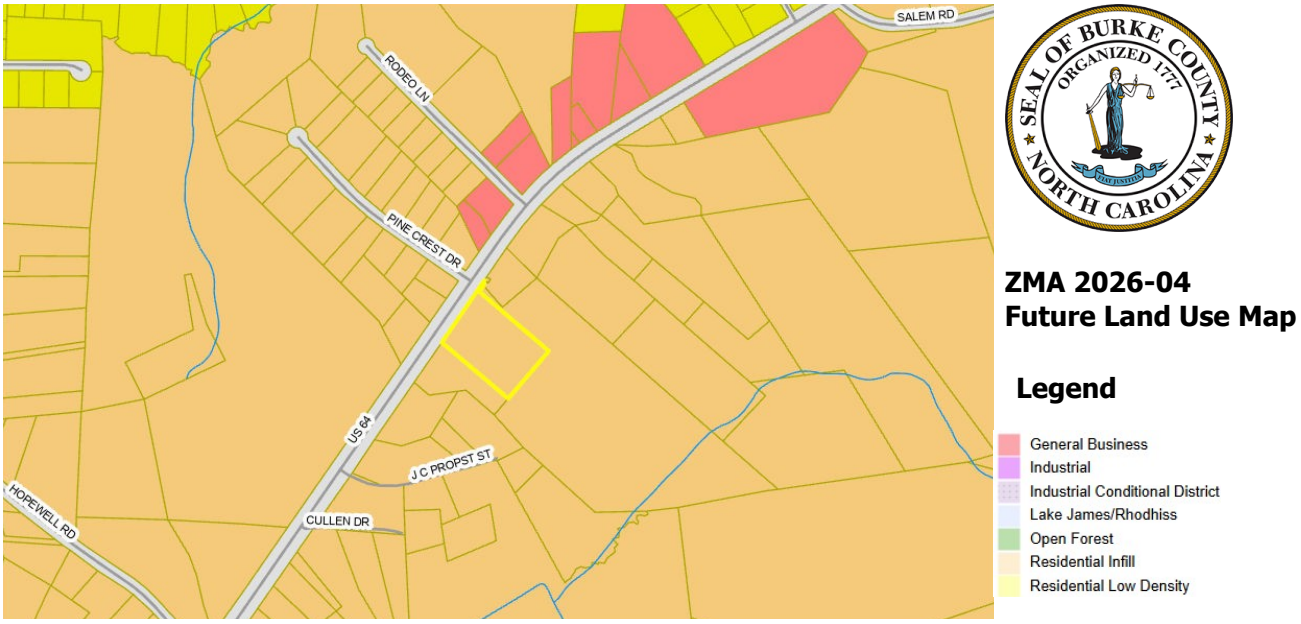
- The R-3 district is established to accommodate a broad range of residential uses along with compatible nonresidential development in areas that are less suburban in character.
- **Permitted Uses:** Residential uses including single family, duplexes, multifamily, townhomes and condos. Manufactured single and double wide homes are permitted. Farm stands, plant nurseries, country clubs, parks and adult care homes are also allowed by right.
- **Special Uses:** Manufactured home parks, campgrounds/rv parks, exterminators, marinas, and homeless shelters.

Proposed Zoning: General Business (G-B)

- The General Business District has been established to provide suitable locations for commercial activities that serve the public.
- **Permitted uses** include most retail, entertainment, and service uses.
- **Special Uses:** Kennels, exterminators, special event grounds, retail spaces greater than 100,000 square feet, and scrap yards.

- Industrial and agricultural uses are limited with distillery, breweries, commercial greenhouses, automobile parts recycling, and mini warehouses being a few examples of industrial and agricultural uses permitted under G-B zoning.

COMPLIANCE WITH THE BLUEPRINT BURKE COMPREHENSIVE PLAN



Map 3: Future Land Use

The 2022-2030 Blueprint Burke Strategic Land Use Plan designates this parcel as ***Residential Infill*** on the future land use map.

The residential infill category supports the following:

- Medium to high density development focuses on suburban or rural neighborhood settings with sufficient access to major roads.
- Access to infrastructure such as public water and sewer.

The requested zoning of General Business is **not consistent** with the future land use map (below) and would require a change to **General Business** on the future land use map.

General Business supports the following:

- Major road access under NCDOT maintenance, infrastructure including water and sewer, and improved driveways for access.
- Encourages uses such as single family, multifamily and manufactured residential development along with most commercial, retail, warehouses, and smaller manufacturing uses.

STAFF FINDINGS:

Community development staff find the rezoning request **reasonable and in the public interest** based on the following:

- The parcel is located along Hwy 64 which provides access to state-maintained roads, utilities and proximity to established commercial uses consistent with Burke County highway corridors.
- While the rezoning is not consistent with the *Blueprint Burke* Strategic Land Use Plan and Land Use Map, it is consistent with its goals to promote economic development along highway corridors with access to utilities and state-maintained roads.

PLANNING BOARD ACTION REPORT

The Burke County Planning Board heard this case at their August 27, 2026 meeting. The applicant's father, Tommy Carlton, spoke on behalf of the applicant and explained that his son (Bryson Carlton, applicant) operates a mobile detailing business and uses the current buildings as storage. Mr. Carlton continued that this rezoning is to bring the property into zoning compliance so the applicant can detail vehicles inside the building. No other members from the public spoke.

The board voted to approve recommendation of the rezoning by a vote of 4-0.

Planning Board Recommendation and Statement of Plan Consistency

Zoning Map Amendment (ZMA 2026-04)

The Burke County Planning Board recommends approval of ZMA 2026-04, a request to rezone a 2.95-acre parcel located at 2763 US 64, Morganton, NC (PIN 1791162409) from the Residential-Three (R-3) District to the General Business (G-B) District.

While the request is not consistent with the 2022–2030 Blueprint Burke Future Land Use Map designation of Residential Infill, the rezoning is found to be reasonable and in the public interest because:

- The parcel is located along Hwy 64 which provides access to state-maintained roads, utilities and proximity to established commercial uses consistent with Burke County highway corridors.
- While the rezoning is not consistent with the *Blueprint Burke* Strategic Land Use Plan and Land Use Map, it is consistent with its goals to promote economic development along highway corridors with access to utilities and state-maintained roads.

Therefore, the Planning Board recommends approval of ZMA 2026-04 and an amendment to the Future Land Use Map to designate this parcel as General Business.

Greg Smith

Chairman, Burke County Planning Board

Burke County

Board Of Commissioners Public Notice

The Burke County Board of Commissioners will hold a Public Meeting at **6:00 PM on October 19, 2026,** in the Commissioners Meeting Room/County Services Building located at 110 N. Green St. in Morganton, NC (Door E). At the meeting they will hear public comments regarding the following matter(s):

ZMA 2026-04 (Bryson Carlton, Applicant)

Request to rezone a parcel of land **from the Residential Three (R-3) District to the Geneal Business (G-B) District on property addressed as 2763 US 64, Morganton NC (PIN # 1791162409)** of Burke County.

ZMA 2026-05 (Chad Huffman, Applicant)

Request to rezone a parcel of land **from the Residential Two (R-2) District to the Geneal Business (G-B) District on property addressed as 7857 Old NC 10, Hickory NC (PIN # 2762852471)** of Burke County.

An Ordinance Amending the Official Burke County Zoning Map
ZMA 2026-04

Be it ordained that the Official Burke County Zoning Map is hereby amended as follows:

To rezone 2.95 acres at 2763 US 64, PIN 1791162409, from Residential-Three (R-3) to General Business (G-B).

Consistency Statement

The Board of Commissioners finds that Ordinance No. 2026-09 related to ZMA 2026-04, 2.95 acres at 2763 US 64, is reasonable and in the public's interest.

Although inconsistent with the 2022-2030 Blueprint Burke Future Land Use Map designation of Residential Infill, the amendment aligns with comprehensive plan goals to foster economic development along established highway corridors with utility and state-maintained road access. Therefore, the Future Land Use Map is hereby amended to designate the parcel as General Business.

Adopted this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

THE NEWS HERALD

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CLASSIFIEDS: classifieds.northcarolina@lee.net **Call:** 434-978-7202

SHOP LOCAL / BUSINESS DIRECTORY: https://morganton.com/places

LEGALS

Legal Notices

BURKE COUNTY BOARD OF COMMISSIONERS NOTICE OF PUBLIC HEARINGS OCTOBER 19, 2026

The Burke County Board of Commissioners will hold a public hearing at 6:00 p.m. or as soon as public comments can be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following matters:

Development Agreement – Clover Ridge Subdivision
Parties: Burke County, City of Morganton, and Western Carolina Developers, LLC
Property: PINs 1794175470 and 1794175020
Location: City of Morganton

A public hearing will be conducted on a proposed development agreement for the Clover Ridge Subdivision

The proposed development agreement governs a phased residential development anticipated to include approximately 25 single-family lots. A copy of the proposed development agreement is available for public inspection in the office of the Clerk to the Board of Commissioners, 200 Avery Avenue, Morganton, NC, and online at www.burkenc.org.

Questions regarding the development agreement may be directed to the County Manager's Office at 828-764-9350. If a reasonable ADA accommodation is needed to participate in the public meeting, please contact the County Manager's Office by October 16, 2026, at 828-764-9350.

Publish: October 8 and October 15, 2026

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

Notice is hereby given that the Burke County Board of Commissioners will hold a public hearing at 6:00 p.m., or as soon thereafter as the matter may be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St., Morganton, NC (Door E), regarding Burke County's proposed participation in the North Carolina Commercial Property Assessed Capital Expenditure (C-PACE) Program.

The North Carolina C-PACE Program is a statewide program that allows eligible owners of qualifying commercial properties to obtain private financing for qualifying improvements, including energy efficiency, renewable energy, resiliency, and water conservation improvements. C-PACE financing is secured through a voluntary assessment and lien on the qualifying property.

The Burke County Board of Commissioners previously adopted a Resolution of Intent on September 21, 2026 declaring the County's intent to participate in the North Carolina C-PACE Program. Following the public hearing, the Board may consider adoption of a resolution authorizing Burke County to join the C-PACE Program.

Interested persons are invited to attend the public hearing and provide comments regarding Burke County's proposed participation in the C-PACE Program.

If reasonable ADA accommodations are needed to participate in the public hearing, please contact the County Manager's Office at 828-764-9350 by October 16, 2026.

Publish: October 8 and 15, 2026.

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

The Burke County Board of Commissioners will hold two public hearings at 6:00 p.m. or as soon as public comments can be heard, on October 19th, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following zoning-related matters:

Zoning Map Amendment - ZMA 2026-04
Request: Request to rezone a parcel of land from the Residential Three (R-3) District to the General Business (G-B) District
Applicant: Bryson Carlton
Property: PIN 1791162409
Address: 2763 US 64, Morganton NC, 28655, Burke County

Zoning Map Amendment - ZMA 2026-05
Request: Request to rezone a parcel of land from the Residential Two (R-2) District to the General Business (G-B) District
Applicant: Chad Huffman
Property: PIN 2762852471
Address: 7857 Old NC 10, Hickory NC, 28602, Burke County

Questions regarding these matters may be directed to the Community Development Department at 828-764-9030. If reasonable ADA accommodations are needed to participate in the public hearings, please contact the County Manager's office by October 16th, 2026, at 828-764-9350.

Publish: October 8 and 15, 2026.



TRIPLE COMMUNITY FIRE DEPT., INC. NOTICE OF BUDGET MEETING

Triple Community Fire Department's budget meeting, scheduled for Oct. 20th at 6:30PM. The meeting will take place at the fire department, located at 505 Mountain View Drive in Morganton.
Publish: Oct. 3, Oct. 10, Oct. 17.

Advertise Your Yard Sales

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LEGALS

Legal Notices

NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that on October 19th, 2026, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), will be held by the Board of Commissioners of the County of Burke, North Carolina (the "County") with respect to the issuance by the Public Finance Authority (the "Authority"), a commission organized under and pursuant to Sections 66.0301, 66.0303, and 66.0304 of the Wisconsin Statutes, of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"). The Authority will loan the proceeds of the Bonds to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Code, to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), including the community located in the County described below, to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds.

The hearing will commence at 6:00 p.m., or as soon thereafter as the matter can be heard, at the County Board Room, 110 North Green Street (Entrance E), Morganton, North Carolina 28655. Notice is being given pursuant to Treasury Regulations Section 1.147(f)-1(d)(4)(iii).

The community located in the County is The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655 (the "Project"). The Project is owned and operated by the Borrower or by a single-member limited liability company of which the Borrower is the sole member. The maximum aggregate principal amount of the Bonds to be issued to finance the acquisition of the Project, together with the other communities comprising the Portfolio, is $115,000,000, of which not more than $25,000,000 is allocable to the financing of the acquisition of the Project. The Bonds are expected to constitute "qualified 501(c)(3) bonds" within the meaning of Section 145(a) of the Code.

The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents. The Bonds will not constitute a debt, liability, or obligation of the County, and the County assumes no financial responsibility for the Bonds by taking the action described in this notice.

The hearing will provide a reasonable opportunity to be heard for persons wishing to express their views on the merits of the issuance of the Bonds and the financing thereby of the Project. All interested parties are invited to present comments at the public hearing.

/s/ MORGAN BUCHANAN
Clerk to the Board of Commissioners
County of Burke, North Carolina

Published: October 8th and 15th , 2026

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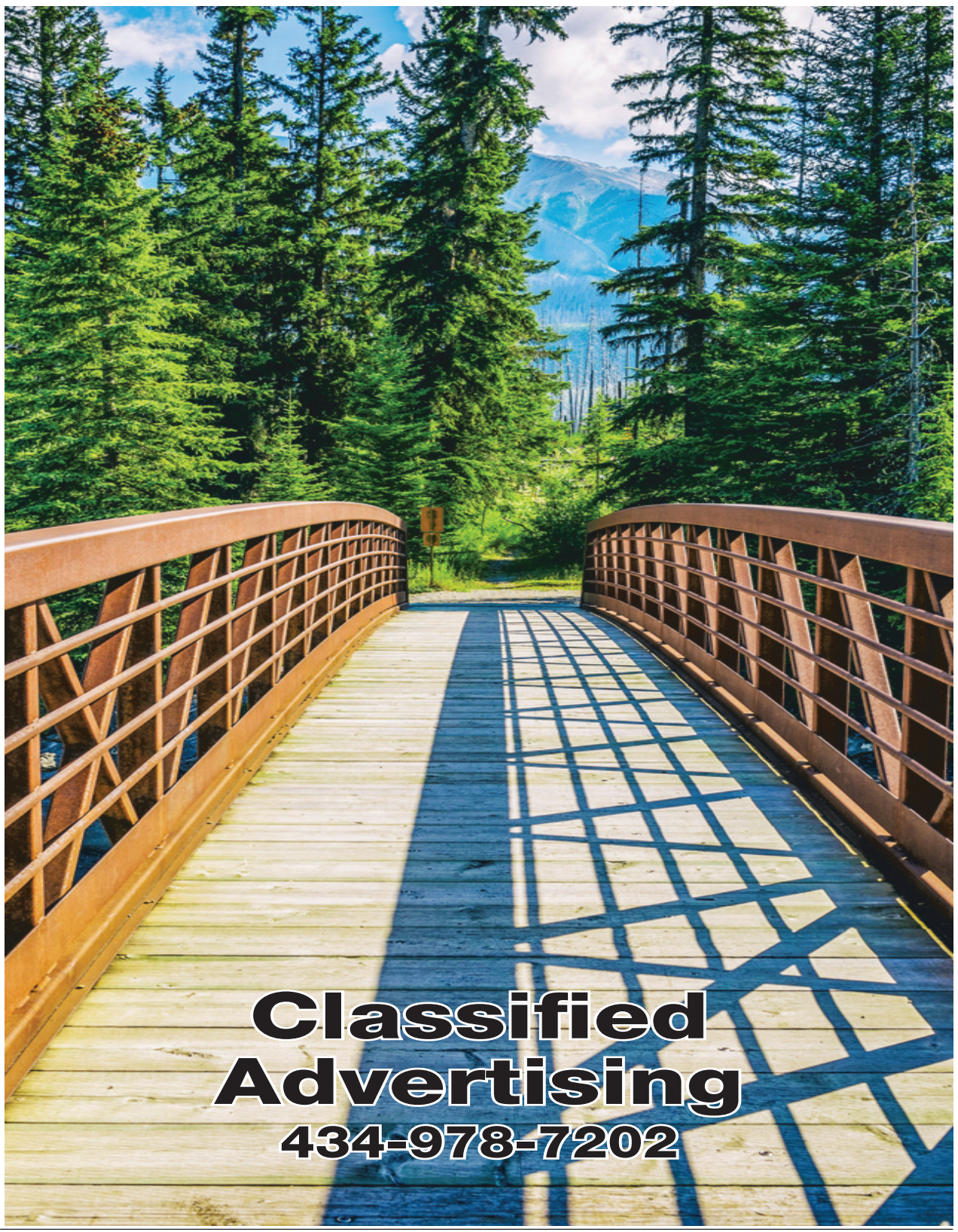

LEGAL NOTICES

Notice to Creditors - Shelba Jean Mull

NORTH CAROLINA, BURKE COUNTY

File No: 26E000807-110

Having qualified as Co-Executor of the Estate of Shelby Jean Mull A/K/A Shelba Jean Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

April Denise Williams, Co-Executor
P.O. Box 1825, Morganton, NC 28680
David Clyde Mull, Co-Executor
P.O. Box 1825, Morganton, NC 28680

Attorney
Daniel Law Firm, P.A.
P.O. Box 1825
Morganton, NC 28680
828-433-0700
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800474

Legals

Casey Winebarger Pope

NORTH CAROLINA, BURKE COUNTY

File No: 26E000779-110

Having qualified as Executor of the Estate of Clay June Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

Gary D. Mull, Executor
115 Searcy Street, Morganton, NC 28655

Attorney
Casey W. Pope
P.O. Box 218
Hickory, NC 28603
828-322-7741
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800475

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Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

SCHEDULED PUBLIC HEARINGS

Subject Title: **CD - ZMA 2026-05, 7857 Old NC HWY 10, Hickory, NC- Zoning Map Amendment & Public Hearing**

Presented by: **Patrick Dickinson, Planner**

Summary of Information: The Community Development Department received a rezoning application (ZMA 2026-05) from Chad Huffman and Catherine Stillwell to rezone a 2.7-acre parcel at 7857 Old NC 10 from Residential-Two (R-2) to General Business (G-B) to accommodate future commercial redevelopment. While the request is inconsistent with the "Residential Infill" designation on the Future Land Use Map, planning staff find the rezoning reasonable and in the public interest because it supports economic development along an established highway corridor with access to utilities and state-maintained roads. Following their meeting on August 27, 2026, the Burke County Planning Board voted unanimously (4-0) to recommend approval of the request. The co-applicant spoke on behalf of the request, no other members of the public spoke.The complete staff report, including site analysis, zoning maps, and property photos, is included as an attachment to this agenda packet for review.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: The County Attorney's Office has reviewed the proposed action for compliance with applicable local, state, and federal laws. No legal concerns were identified. All statutory and procedural requirements appear to be met.

Suggested Motion: To adopt Ordinance No. 2026-10 as it relates to ZMA 2026-05 to rezone 2.7 acres at 7857 Old NC 10, PIN 2762852471, from Residential-Two (R-2) to General Business (G-B), adopt the amending ordinance, and amend the Future Land Use Map to General Business. The Board finds that the request is reasonable and in the public interest because it supports economic development along an established state-maintained highway corridor, provides access to utilities, and directly adjoins existing commercial zoning.

OR

To deny Ordinance No. 2026-10 as it relates to ZMA 2026-05 to rezone 2.7 acres at 7857 Old NC 10, PIN 2762852471, from Residential-Two (R-2) to General Business (G-B). The Board finds that the request is not reasonable and not in the public interest because it is inconsistent with the 'Residential Infill' designation on the Future Land Use Map and incompatible with surrounding residential uses.

Public Hearing:

Board review of **ZMA-2026-05**

- **Applicant:** Chad Huffman & Catherine Stillwell
- **PIN:** 2762852471
- **Address:** 7857 Old NC 10 Hickory NC 28602
- **Request:** Rezone a single parcel of 2.7 acres ***from*** Residential Two (R-2) ***to*** General Business (G-B)

BURKECOUNTY

1

ZMA 2026-05 Existing Conditions

- The subject parcel is partially cleared with a single-family home and vacant manufactured home currently on the parcel.
- It is located within the Icard fire district and Icard Township.
- Parcel access is provided via Old NC 10, a state-maintained highway.
- This corridor is a mix of commercial, institutional, public service, and low to medium density residential land uses. Existing general business zoning (gas station /drive through restaurant) adjoins the parcel.



2

ZMA 2026-05 Site Photos







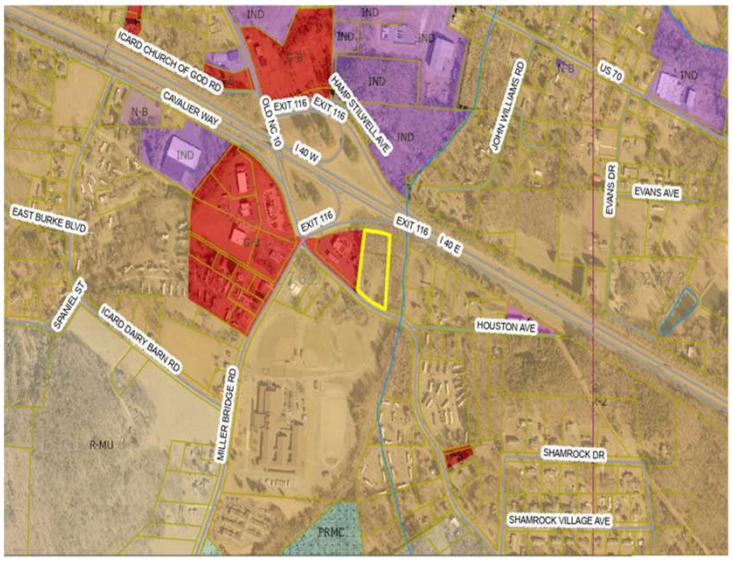


BURKECOUNTY

3

ZMA 2026-05 Current Zoning

- **Current Zoning: Residential Three (R-2)**
  - Allows most residential uses including Stick Built, Modular, & Class A Manufactured Homes.
  - Special uses: Multifamily, golf Campgrounds, marinas, homeless shelters.
- **Proposed Zoning: General Business (G-B)**
  - Allows most retail, entertainment, and services uses.
  - Special uses: retail larger than 100,000 sqft, adult entertainment, scrapyards.



SEAL OF BURKE COUNTY ORGANIZED 1777 NORTH CAROLINA

ZMA 2026-05
7857 OLD NC 10
Hickory NC

County Zoning
- R-1 Residential Low Density
- R-2 Residential Medium Density
- R-3 Residential
- R-MU Rural Mixed Use
- PRMU Planned Residential Mixed-Use
- PRMU Conditional
- CON
- N-B Neighborhood Business
- G-B General Business
- GB Conditional
- O-I Office & Institutional
- OI Conditional
- L-I Light Industrial
- IND Industrial

4

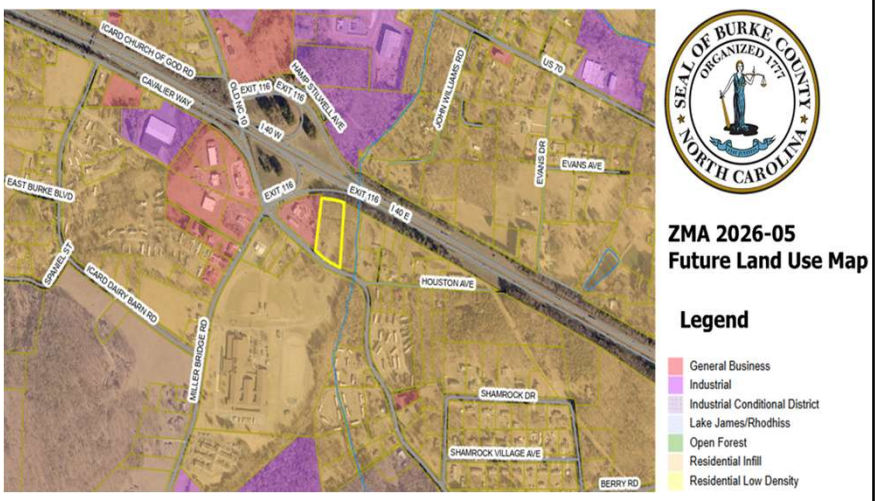
ZMA 2026-05 Future Land Use Map

Current Designation: Residential Infill

- R-2 & R-3 (higher density) zoning.
- Encourages use of single-family stick built or manufactured & multifamily developments.

Proposed Designation: General Business

- Access to major roadways and utilities.
- Residential, commercial, retail, warehouses uses are encouraged.



5

ZMA 2026-05 Staff Findings

Community development staff find the rezoning request **reasonable and in public interest** based on the following:

- The parcel is located along Old NC Hwy 10 which provides access to state-maintained roads, utilities and proximity to established commercial uses consistent with Burke County highway corridors.

- While the rezoning is not consistent with the Blueprint Burke Strategic Land Use Plan and Land Use Map, it is consistent with its goals to promote economic development along highway corridors with access to utilities and state-maintained roads.

6

BURKECOUNTY

THANK YOU

Questions for staff?



7

Case: ZMA 2026-05

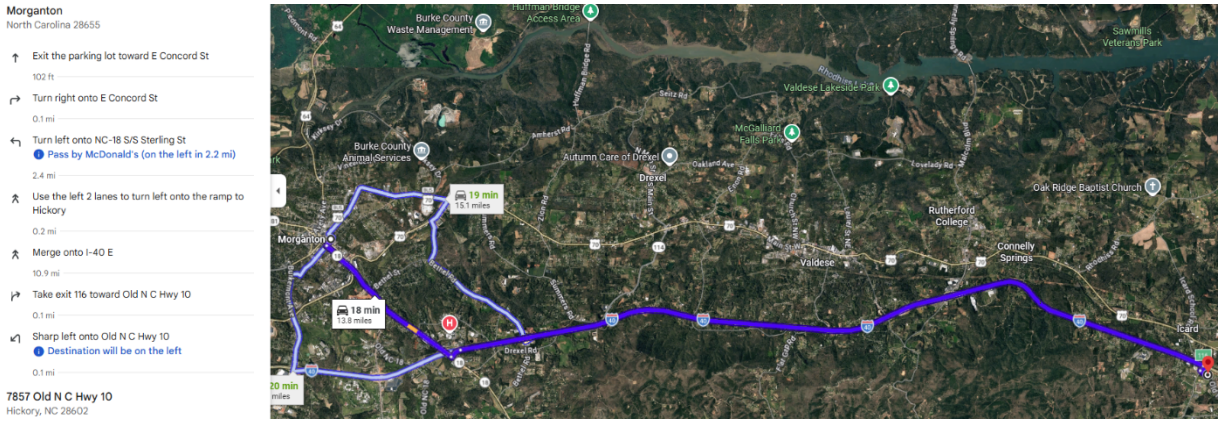
Applicant: Chad Huffman & Catherine Stillwell

PIN: 2762852471

Address: 7857 Old NC 10 Hickory, NC 28602

Request: To rezone a single parcel of 2.7 acres ***from*** Residential- Two (R-2) ***to*** General Business (G-B)

Location:



BACKGROUND INFORMATION

Applicant request

The Community Development Dept. has received a rezoning application from Chad Huffman requesting to rezone a parcel totaling approximately 2.7 acres from the current zoning of Residential- Two (R-2) to General Business (G-B).

SITE ANALYSIS AND SURROUNDING AREA

Current Conditions:

- The subject parcel is partially cleared with a single-family home and vacant manufactured home currently on the parcel.
- It is located within the Icard fire district and Icard Township.
- Parcel access is provided via Old NC 10, a state-maintained highway.

Surrounding Zoning and Land Use:

Direction	Current Zoning	Existing Land Use
North	Industrial (IND)	Residential
South	Residential Two (R-2)	Institutional / School
East	Residential Two (R-2)	Residential
West	General Business (G-B)	Gas Station / Drive Through Restaurant

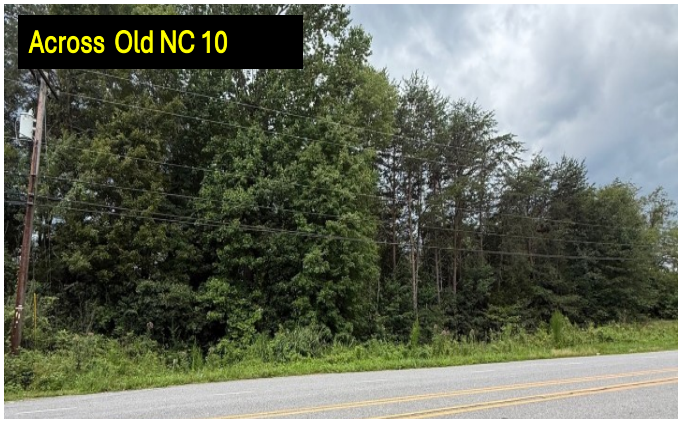
This parcel fronts Old NC Hwy 10. This corridor is a mix of commercial, institutional, public service, and low to medium density residential land uses. Existing general business zoning (gas station /drive through restaurant) adjoins the parcel.

Map 1 : Satellite & Existing Land Use



Site Photos

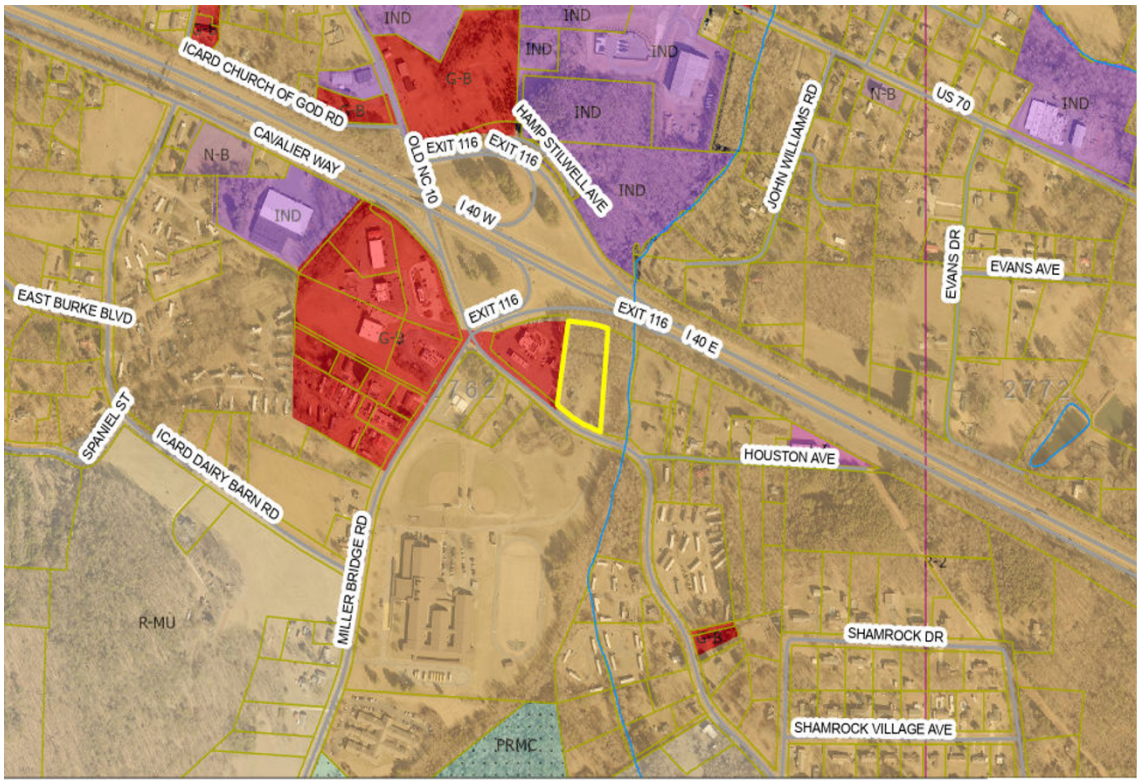








ZONING & FUTURE LAND USE CONSIDERATIONS



Map 2: Current Zoning Map

ZMA 2026-05
7857 OLD NC 10
Hickory NC

County Zoning
- R-1 Residential Low Density
- R-2 Residential Medium Density
- R-3 Residential
- R-MU Rural Mixed Use
- PRMU Planned Residential Mixed-Use
- PRMU Conditional
- CON
- N-B Neighborhood Business
- G-B General Business
- GB Conditional
- O-I Office & Institutional
- OI Conditional
- L-I Light Industrial
- IND Industrial

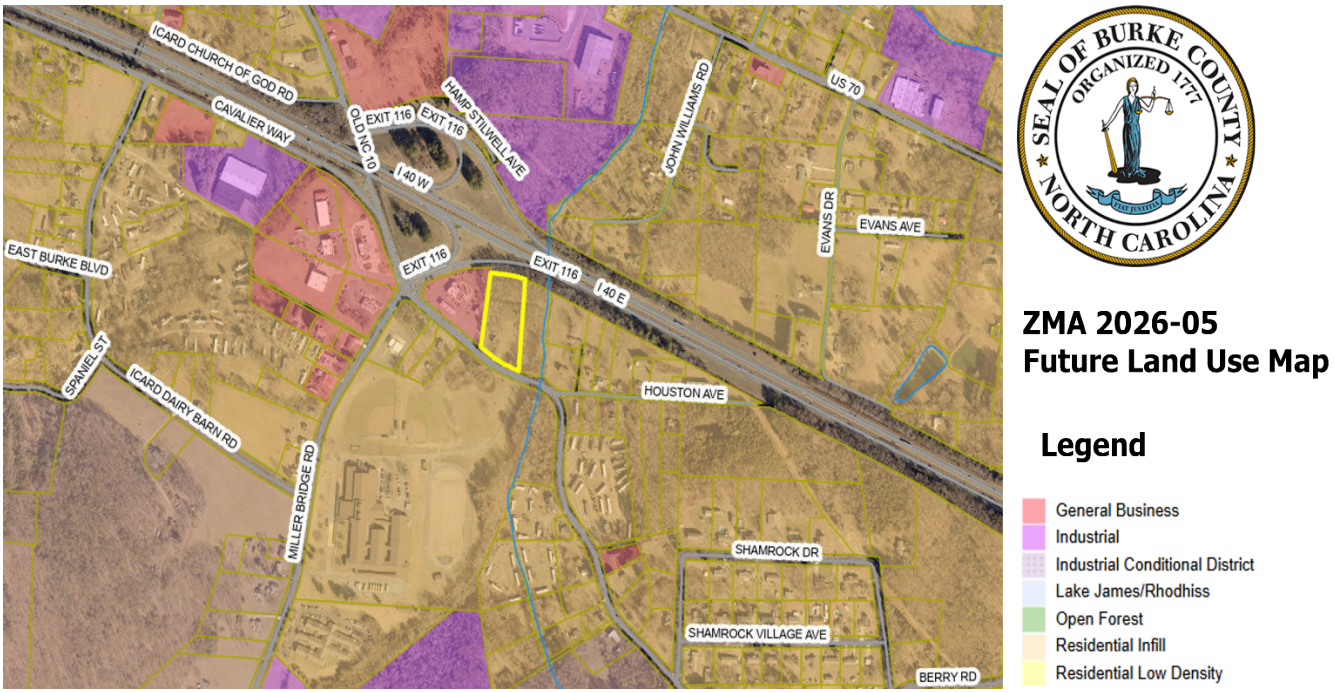
Current Zoning: Residential Two (R-2)

- The R-2 district is established to accommodate more residential uses except for than the R-1 district along with limited compatible non-residential uses.
- **Permitted Uses:** Residential uses including single family, and duplexes. Class A (double-wide) homes are permitted along with family care homes, and adult care homes.
- **Special Uses:** Multifamily townhomes and condos, country clubs, golf courses, parks, and public use facilities are allowed by special use permit.

Proposed Zoning: General Business (G-B)

- The General Business District has been established to provide suitable locations for commercial activities that serve the public.
- **Permitted uses** include most retail, entertainment, and service uses.
- **Special Uses:** Kennels, exterminators, special event grounds, retail spaces greater than 100,000 square feet, and scrap yards.
- Industrial and agricultural uses are limited with distillery, breweries, commercial greenhouses, automobile parts recycling, and mini warehouses being a few examples of industrial and agricultural uses permitted under G-B zoning.

COMPLIANCE WITH THE BLUEPRINT BURKE COMPREHENSIVE PLAN



Map 3: Future Land Use

The 2022-2030 Blueprint Burke Strategic Land Use Plan designates this parcel as ***Residential Infill*** on the future land use map.

The residential infill category supports the following:

- Medium to high density development focuses on suburban or rural neighborhood settings with sufficient access to major roads.
- Access to infrastructure such as public water and sewer.

The requested zoning of General Business is **not consistent** with the future land use map (below) and would require a change to **General Business** on the future land use map.

General Business supports the following:

- Major road access under NCDOT maintenance, infrastructure including water and sewer, and improved driveways for access.
- Encourages uses such as single family, multifamily and manufactured residential development along with most commercial, retail, warehouses, and smaller manufacturing uses.

STAFF FINDINGS:

Community development staff find the rezoning request **reasonable and in the public interest** based on the following:

- The parcel is located along Old NC Hwy 10 which provides access to state-maintained roads, utilities and proximity to established commercial uses consistent with Burke County highway corridors.
- While the rezoning is not consistent with the Blueprint Burke Strategic Land Use Plan and Land Use Map, it is consistent with its goals to promote economic development along highway corridors with access to utilities and state-maintained roads.

PLANNING BOARD ACTION REPORT

The Burke County Planning Board heard this case at their August 27, 2026 meeting. Co-applicant Chad Huffman spoke on behalf of the request, explaining that his 72-year-old mother resides on the property in a 1934 home that requires substantial repairs. Mr. Huffman stated that the commercial rezoning is sought to sell the property so his mother can purchase a newer home and retire, citing the parcel's prime commercial location near I-40 and potential uses such as storage or restaurants to serve surrounding growth, including an 84-home subdivision planned nearby. No other members of the public spoke in favor of or in opposition to the request.

The board voted to recommend approval of the rezoning by a vote of 4-0.

Planning Board Recommendation and Statement of Plan Consistency

Zoning Map Amendment (ZMA 2026-05)

The Burke County Planning Board recommends approval of ZMA 2026-05, a request to rezone a 2.7-acre parcel located at 7857 Old NC 10, Hickory, NC (PIN 2762852471) from the Residential-Two (R-2) District to the General Business (G-B) District.

While the request is not consistent with the 2022–2030 Blueprint Burke Future Land Use Map designation of Residential Infill, the rezoning is found to be reasonable and in the public interest because:

- The parcel is located along Old NC Hwy 10 which provides access to state-maintained roads, utilities and proximity to established commercial uses consistent with Burke County highway corridors.
- While the rezoning is not consistent with the Blueprint Burke Strategic Land Use Plan and Land Use Map, it is consistent with its goals to promote economic development along highway corridors with access to utilities and state-maintained roads.

Therefore, the Planning Board recommends approval of ZMA 2026-05 and an amendment to the Future Land Use Map to designate this parcel as General Business.

Greg Smith

Chairman, Burke County Planning Board

An Ordinance Amending the Official Burke County Zoning Map
ZMA 2026-05

Be it ordained that the Official Burke County Zoning Map is hereby amended as follows:

To rezone a 2.7-acre parcel at 7857 Old NC 10 from Residential-Two (R-2) to General Business (G-B) to accommodate future commercial redevelopment.

Consistency Statement

The Board of Commissioners finds that Ordinance No. 2026-10 related to ZMA 2026-05, 2.7-acre parcel at 7857 Old NC 10, is reasonable and in the public's interest.

Although inconsistent with the 2022-2030 Blueprint Burke Future Land Use Map designation of Residential Infill, the amendment aligns with comprehensive plan goals to foster economic development along established highway corridors with utility and state-maintained road access. Therefore, the Future Land Use Map is hereby amended to designate the parcel as General Business.

Adopted this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

THE NEWS HERALD

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LEGALS

Legal Notices

BURKE COUNTY BOARD OF COMMISSIONERS NOTICE OF PUBLIC HEARINGS OCTOBER 19, 2026

The Burke County Board of Commissioners will hold a public hearing at 6:00 p.m. or as soon as public comments can be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following matters:

Development Agreement – Clover Ridge Subdivision
Parties: Burke County, City of Morganton, and Western Carolina Developers, LLC
Property: PINs 1794175470 and 1794175020
Location: City of Morganton

A public hearing will be conducted on a proposed development agreement for the Clover Ridge Subdivision

The proposed development agreement governs a phased residential development anticipated to include approximately 25 single-family lots. A copy of the proposed development agreement is available for public inspection in the office of the Clerk to the Board of Commissioners, 200 Avery Avenue, Morganton, NC, and online at www.burkenc.org.

Questions regarding the development agreement may be directed to the County Manager's Office at 828-764-9350. If a reasonable ADA accommodation is needed to participate in the public meeting, please contact the County Manager's Office by October 16, 2026, at 828-764-9350.

Publish: October 8 and October 15, 2026

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

Notice is hereby given that the Burke County Board of Commissioners will hold a public hearing at 6:00 p.m., or as soon thereafter as the matter may be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St., Morganton, NC (Door E), regarding Burke County's proposed participation in the North Carolina Commercial Property Assessed Capital Expenditure (C-PACE) Program.

The North Carolina C-PACE Program is a statewide program that allows eligible owners of qualifying commercial properties to obtain private financing for qualifying improvements, including energy efficiency, renewable energy, resiliency, and water conservation improvements. C-PACE financing is secured through a voluntary assessment and lien on the qualifying property.

The Burke County Board of Commissioners previously adopted a Resolution of Intent on September 21, 2026 declaring the County's intent to participate in the North Carolina C-PACE Program. Following the public hearing, the Board may consider adoption of a resolution authorizing Burke County to join the C-PACE Program.

Interested persons are invited to attend the public hearing and provide comments regarding Burke County's proposed participation in the C-PACE Program.

If reasonable ADA accommodations are needed to participate in the public hearing, please contact the County Manager's Office at 828-764-9350 by October 16, 2026.

Publish: October 8 and 15, 2026.

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

The Burke County Board of Commissioners will hold two public hearings at 6:00 p.m. or as soon as public comments can be heard, on October 19th, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following zoning-related matters:

Zoning Map Amendment - ZMA 2026-04
Request: Request to rezone a parcel of land from the Residential Three (R-3) District to the General Business (G-B) District
Applicant: Bryson Carlton
Property: PIN 1791162409
Address: 2763 US 64, Morganton NC, 28655, Burke County

Zoning Map Amendment - ZMA 2026-05
Request: Request to rezone a parcel of land from the Residential Two (R-2) District to the General Business (G-B) District
Applicant: Chad Huffman
Property: PIN 2762852471
Address: 7857 Old NC 10, Hickory NC, 28602, Burke County

Questions regarding these matters may be directed to the Community Development Department at 828-764-9030. If reasonable ADA accommodations are needed to participate in the public hearings, please contact the County Manager's office by October 16th, 2026, at 828-764-9350.

Publish: October 8 and 15, 2026.



TRIPLE COMMUNITY FIRE DEPT., INC. NOTICE OF BUDGET MEETING

Triple Community Fire Department's budget meeting, scheduled for Oct. 20th at 6:30PM. The meeting will take place at the fire department, located at 505 Mountain View Drive in Morganton.
Publish: Oct. 3, Oct. 10, Oct. 17.

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LEGALS

Legal Notices

NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that on October 19th, 2026, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), will be held by the Board of Commissioners of the County of Burke, North Carolina (the "County") with respect to the issuance by the Public Finance Authority (the "Authority"), a commission organized under and pursuant to Sections 66.0301, 66.0303, and 66.0304 of the Wisconsin Statutes, of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"). The Authority will loan the proceeds of the Bonds to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Code, to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), including the community located in the County described below, to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds.

The hearing will commence at 6:00 p.m., or as soon thereafter as the matter can be heard, at the County Board Room, 110 North Green Street (Entrance E), Morganton, North Carolina 28655. Notice is being given pursuant to Treasury Regulations Section 1.147(f)-1(d)(4)(iii).

The community located in the County is The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655 (the "Project"). The Project is owned and operated by the Borrower or by a single-member limited liability company of which the Borrower is the sole member. The maximum aggregate principal amount of the Bonds to be issued to finance the acquisition of the Project, together with the other communities comprising the Portfolio, is $115,000,000, of which not more than $25,000,000 is allocable to the financing of the acquisition of the Project. The Bonds are expected to constitute "qualified 501(c)(3) bonds" within the meaning of Section 145(a) of the Code.

The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents. The Bonds will not constitute a debt, liability, or obligation of the County, and the County assumes no financial responsibility for the Bonds by taking the action described in this notice.

The hearing will provide a reasonable opportunity to be heard for persons wishing to express their views on the merits of the issuance of the Bonds and the financing thereby of the Project. All interested parties are invited to present comments at the public hearing.

/s/ MORGAN BUCHANAN
Clerk to the Board of Commissioners
County of Burke, North Carolina

Published: October 8th and 15th , 2026

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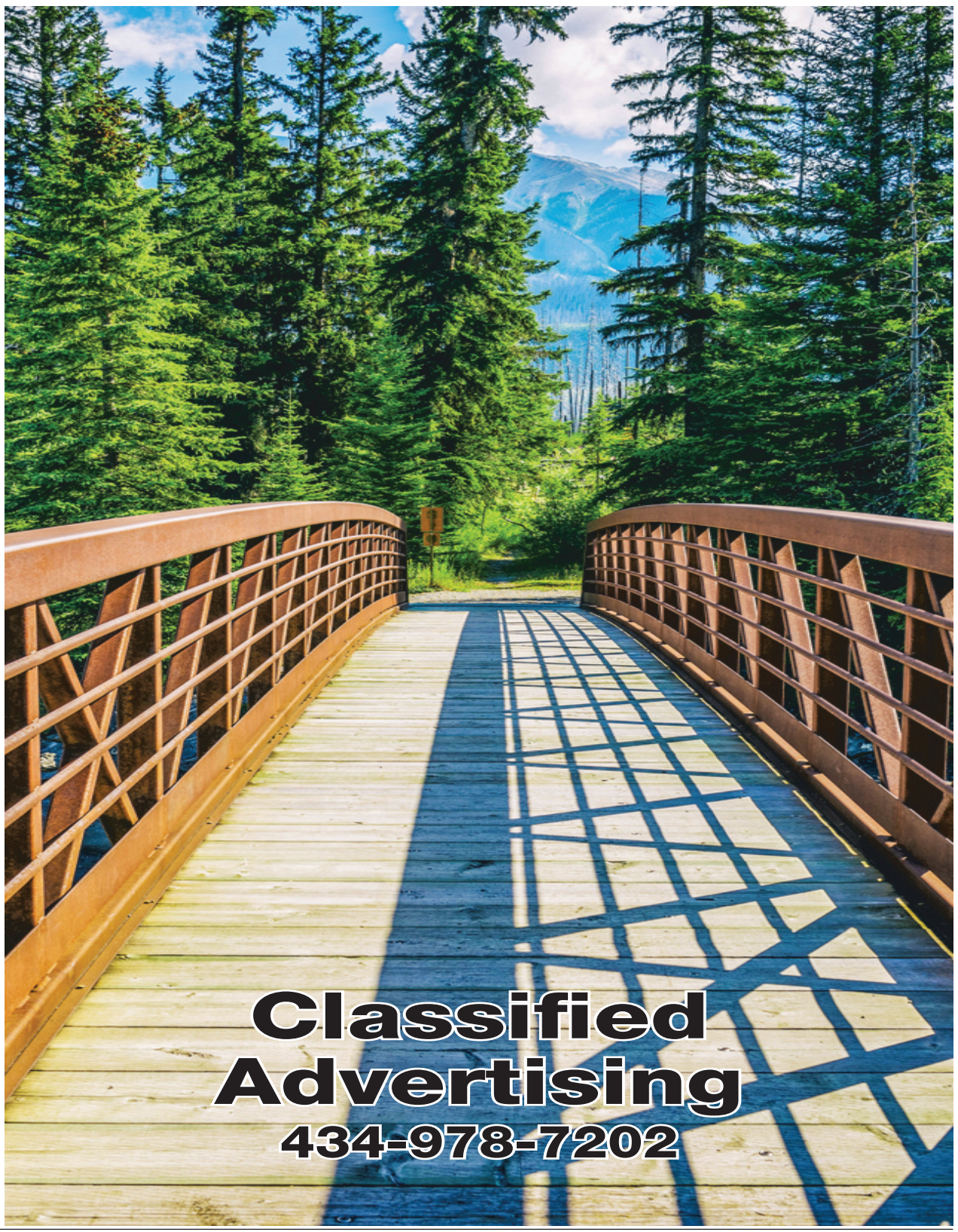

LEGAL NOTICES

Notice to Creditors - Shelba Jean Mull

NORTH CAROLINA, BURKE COUNTY

File No: 26E000807-110

Having qualified as Co-Executor of the Estate of Shelby Jean Mull A/K/A Shelba Jean Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

April Denise Williams, Co-Executor
P.O. Box 1825, Morganton, NC 28680
David Clyde Mull, Co-Executor
P.O. Box 1825, Morganton, NC 28680

Attorney
Daniel Law Firm, P.A.
P.O. Box 1825
Morganton, NC 28680
828-433-0700
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800474

Legals

Casey Winebarger Pope

NORTH CAROLINA, BURKE COUNTY

File No: 26E000779-110

Having qualified as Executor of the Estate of Clay June Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

Gary D. Mull, Executor
115 Searcy Street, Morganton, NC 28655

Attorney
Casey W. Pope
P.O. Box 218
Hickory, NC 28603
828-322-7741
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800475

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Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

SCHEDULED PUBLIC HEARINGS

Subject Title: **CM - Resolution of Support for Piedmont Affordable Senior Housing Foundation & The Berkeley**

Presented by: **Dr. Lindsay Duch**

Summary of Information: The Burke County Board of Commissioners will conduct a public hearing regarding the proposed issuance by the Public Finance Authority of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026.

The bond financing will support the acquisition of six senior-living communities in North Carolina, including The Berkeley, an assisted living and memory care community located at 330 Juniper Street, Morganton, North Carolina. The bonds are proposed in an aggregate principal amount not to exceed $115,000,000, of which not more than $25,000,000 will be allocated to the acquisition of The Berkeley.

Following the public hearing, the Board will consider adoption of Resolution No. 2026-23 supporting the proposed bond financing solely as it relates to The Berkeley. Burke County will not issue the bonds and will not borrow, lend, guarantee, or otherwise assume financial responsibility for repayment of the bonds.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: N.A.

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: Motion to adopt Resolution No. 2026-23 approving the issuance by the Public Finance Authority of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, solely for purposes of Section 147(f) of the Internal Revenue Code and solely with respect to the financing of The Berkeley, located

at 330 Juniper Street, Morganton, North Carolina, in an amount not to exceed $25,000,000.

or

Motion to deny Resolution No. 2026-23 approving the issuance by the Public Finance Authority of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, solely for purposes of Section 147(f) of the Internal Revenue Code and solely with respect to the financing of The Berkeley, located at 330 Juniper Street, Morganton, North Carolina, in an amount not to exceed $25,000,000.

MEMORANDUM

To: Burke County Board of Commissioners
From: Piedmont Affordable Senior Housing Foundation, Inc.
Date: August 24, 2026
Re: Request to Adopt a Resolution in Support of the Bond Financing for The Berkeley

---

Piedmont Affordable Senior Housing Foundation, Inc. ("PASHF") is asking the Burke County Board of Commissioners to hold a public hearing and adopt a resolution in support of the bond financing for The Berkeley. This memo covers what the Board is being asked to do, and just as importantly, what it is not being asked to do.

Who We Are and What We Are Doing

PASHF is a North Carolina nonprofit corporation. PASHF is buying six senior living communities across North Carolina. One of them, The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655, is in Burke County. The Berkeley is an assisted living and memory care community, serving older adults.

How PASHF Is Paying for the Purchase

PASHF is borrowing money to help pay for these communities. It plans to borrow the money through bonds. A bond works much like a loan: investors provide money up front, and PASHF pays it back over time, with interest, similar to a mortgage.

Because PASHF is a nonprofit that serves seniors, federal tax law allows the interest on these bonds to be exempt from federal income tax. That tax break lowers PASHF's borrowing costs, which helps keep the communities financially healthy and helps keep care affordable for residents.

Why We Need the County's Help

Federal tax law will not allow this kind of tax-exempt bond to be issued unless two things happen first: a public hearing, and approval by an elected official or body with authority over the area where the project is located. For The Berkeley, that is the Burke County Board of Commissioners.

This requirement exists so that residents of the community where the project is located get a chance to learn about it and share their views, and so that a local elected government confirms it is aware of the project. It is a federal tax law requirement. It is not a request for the County to evaluate or endorse the business of the project.

The bonds will actually be issued by the Public Finance Authority, a public financing agency organized in Wisconsin that regularly issues tax-exempt bonds for nonprofit projects across the country, including many projects in North Carolina. Burke County is not being asked to issue any bonds itself.

What the County Is Being Asked to Do

We are asking the Board of Commissioners to do two things. First, hold a public hearing to give county residents a chance to comment on the project. Second, after the hearing, adopt a resolution in support of the bond financing, to the extent it relates to The Berkeley.

The bonds for the full six-community portfolio will not exceed $115,000,000 in total. Of that amount, no more than $25,000,000 is allocated to The Berkeley. This figure is a ceiling set by the bond documents. It is not necessarily the amount PASHF will actually spend.

What the County Is Not Being Asked to Do

Approving the resolution will not cost Burke County any money. The County is not borrowing money, is not lending money, and is not guaranteeing repayment of the bonds. If PASHF cannot repay the bonds, the County has no financial responsibility for that debt.

The County's approval is also limited to The Berkeley. It does not apply to, and does not express any view on, the other communities in the portfolio, which are located in other North Carolina counties and are subject to their own separate approval processes.

Next Steps

We understand the Board's next regularly scheduled meeting is September 21, 2026 at 6:00 p.m. That date is proposed. We respectfully ask that the Board place this matter on the agenda for that meeting, or for whatever date works best for the Board's calendar.

We will provide a form of public notice for the County to publish before the hearing and a form of resolution for the Board's consideration at the hearing.

Questions

If you have any questions about this request, please contact:

Bryan Starnes, ALG Senior, email bstarnes@algsenior.com.

Ray Jones or Ryan Romano, bond counsel to PASHF in this financing, at Parker Poe Adams & Bernstein LLP, telephone 704-372-9000, email rayjones@parkerpoe.com or ryanromano@parkerpoe.com.

BURKE COUNTY
NORTH CAROLINA

RESOLUTION TO APPROVE THE ISSUANCE OF BONDS BY THE PUBLIC FINANCE AUTHORITY FOR THE BENEFIT OF PIEDMONT AFFORDABLE SENIOR HOUSING FOUNDATION HOLDCO LLC

WHEREAS, the Public Finance Authority (the "Authority") proposes to issue its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"), the proceeds of which the Authority will loan to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the "Code"), to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds;

WHEREAS, the community in the Portfolio located within the County, known as The Berkeley (the "Project"), is owned and operated by the Borrower or a single-member limited liability company of which the Borrower is the sole member, and is located at 330 Juniper Street, Morganton, North Carolina 28655;

WHEREAS, pursuant to Section 147(f) of the Code, prior to the issuance of the Bonds, the Bonds are required to be approved by the "applicable elected representative" of a governmental unit having jurisdiction over the area in which the Project is located, after a public hearing held following reasonable public notice, because the Authority is not itself a governmental unit with jurisdiction over the area in which the Project is located;

WHEREAS, the Board of Commissioners of the County is the "applicable elected representative" of the County for the Project;

WHEREAS, the County has been requested to approve the issuance of the Bonds by the Authority for the purpose of financing the acquisition of the Project in order to satisfy the requirements of Section 147(f) of the Code; and

WHEREAS, the Board of Commissioners, following notice duly given on the County's Web site in the form attached hereto as Exhibit A (the "TEFRA Notice"), held a public hearing on October 19th, 2026 regarding the issuance of the Bonds by the Authority and the financing of the acquisition of the Project, and now desires to approve the issuance of the Bonds by the Authority in accordance with the Code;

BE IT RESOLVED by the Board of Commissioners as follows:

Section 1. The issuance of the Bonds by the Authority in an aggregate principal amount not to exceed $115,000,000, of which not more than $25,000,000 will be allocated to finance the acquisition of the Project, is hereby approved by the Board of Commissioners for purposes of Section 147(f) of the Code. This approval does not constitute or imply any responsibility of the County for the repayment of the Bonds. The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents, and will not constitute a debt, liability, or obligation of the County.

Section 2. This resolution is effective immediately on its passage.

I, Morgan Buchanan, Clerk to the Board of Commissioners of the County of Burke, North Carolina, DO HEREBY CERTIFY that the foregoing is a true and exact copy of a resolution titled "RESOLUTION OF THE BOARD OF COMMISSIONERS OF THE COUNTY OF BURKE, NORTH CAROLINA, APPROVING THE ISSUANCE OF BONDS BY THE PUBLIC FINANCE AUTHORITY FOR THE BENEFIT OF PIEDMONT AFFORDABLE SENIOR HOUSING FOUNDATION HOLDCO I LLC," adopted by the Board of Commissioners of the County of Burke, North Carolina in regular session convened on the 19th day of October, 2026, and the holding of a public hearing related thereto, as recorded in the minutes of the Board of Commissioners of the County of Burke, North Carolina,

*********THIS SPACE HAS BEEN INTENTIONALLY LEFT BLANK**********

WITNESS my hand and the seal of the County of Burke, North Carolina, this the 19th day of October, 2026.

Adopted the 19th day of October, 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

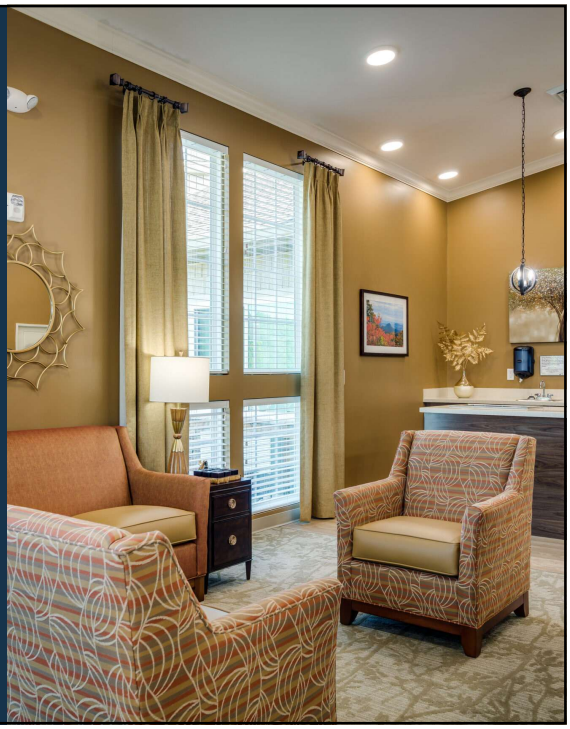
ATTEST:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

The Berkeley

Piedmont Affordable Senior Housing Foundation

Burke County Board of Commissioners
October 2026



1

Piedmont Affordable Senior Housing Foundation, Inc. ("PASHF")

Requestor:

Piedmont Affordable Senior Housing Foundation is a North Carolina nonprofit corporation. PASHF is buying six (6) senior living communities across North Carolina. One of them, The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655, is in Burke County. The Berkeley is an assisted living and memory care community, serving older adults.

How is PASHF Paying for the Purchase:

PASHF is borrowing money to help pay for these communities. It plans to borrow the money through bonds. A bond works much like a loan: investors provide money up front, and PASHF pays it back over time, with interest, similar to a mortgage.

Because PASHF is a nonprofit that serves seniors, federal tax law allows the interest on these bonds to be exempt from federal income tax. That tax break lowers PASHF's borrowing costs, which helps keep the communities financially healthy and helps keep care affordable for residents.

2

The Berkeley in Burke County

Local Fact	Current Information
Location	330 Juniper Street, Morganton
Real Property Owner	FP Real Estate Investments LLC
Estimated Real Property Value	$8,351,311
County Property Tax Paid, Tax Year 2026	$45,886.26

02

3

What is TEFRA?

Congress created the Tax Equity and Fiscal Responsibility Act of 1982 (TEFRA) to limit the use of tax-exempt bonds.

TEFRA ensures that only projects with substantial public benefit can be financed this way. These are commonly used for senior care centers, charter schools, etc. throughout the State and the nation. These types of resolutions are common and the County (or other NC entities) for non-profit 501(c)(3) entities to access tax exempt funds for their projects.

Before a tax-exempt bond issue can proceed, it must get public approval. Approval is typically given after a public hearing where residents are given at least seven (7) days. The hearing allows the public to comment, and the approval must occur within one year before the first bond issue under the plan. Because Congress can't assess local needs, the approval process ensures local government has the opportunity to review and decide.

Without TEFRA approval, the bonds cannot be tax-exempt, which affects borrowing costs and eligibility for certain financing programs.

4

The IRS explains that bonds issued under § 145 can receive tax-exempt treatment under § 103 when the applicable requirements are met. Internal Revenue Service The public approval procedure appears in § 147(f) and **Treasury Regulation § 1.147(f)-1**.

Tax-Exempt Financing: IRC Framework

IRC section	Role
§ 103(a)	Provides the federal income-tax exclusion for interest on qualifying state and local bonds.
§ 145(a)	Defines the qualified nonprofit bonds proposed for this transaction, subject to ownership, use, and other requirements.
§ 147(f)	Establishes the TEFRA public hearing and elected-government approval requirement, which is why Burke County's participation is requested.

The Berkeley / Burke County Board of Commissioners

5

NC Personal Care Services Alignment Demonstration

Proposed Section 1115 waiver under enacted S.L. 2025-64 (HB 546)

CMS APPROVAL REQUIRED

Public comment: Sept. 10–Nov. 9, 2026, closing at 5 p.m. Eastern

Eligibility and scope	Proposed demonstration
Who qualifies	Medicare beneficiaries living in or seeking admission to licensed adult care homes or special care units
Income limits	Above the Special Assistance limit, up to 180% of poverty for adult care homes or 200% for special care units
Other requirements	Assessed need for PCS, other Special Assistance requirements and Medicaid nonfinancial eligibility rules
Covered benefit	Personal care services only, such as help with bathing, dressing, eating, mobility and toileting
Program scale	Estimated 6,000 people statewide at full implementation, with about an 11-month phase-in
Delivery and duration	Five years statewide through NC Medicaid Direct, the fee-for-service system

Coverage boundaries

Residents pay room and board. The waiver provides PCS only, rather than full Medicaid.
Medicare stays primary. Existing PCS rules and rates remain unchanged.
No added premiums, copays or deductibles. Current Medicaid benefits stay unchanged.

Source: NC Medicaid, proposed PCS Alignment Demonstration, September 2026

6

Parker Poe
Attorneys & Counselors at Law

WARD AND SMITH, P.A.
ATTORNEYS AT LAW

7

County Fiscal Considerations

Bond Repayment

The County will have no repayment liability or loan guarantee.

Does not impact County bond rating.

County affords no endorsement of Foundation's ability to pay bonds.

Property Tax

The Foundation has communicated an intent to file for local property tax exemption – which will be reviewed and processed in accordance to N.C.G.S. 105. But not a guarantee or automatic.

10

8

Foundation By Laws - 40% Medicaid commitment

40%

Reported minimum Medicaid participation

Bylaws and governing authority needed

2

Current Medicaid residents
Total resident census needed

08

9

Board of Commissioners:

The public benefit determination

Will lower financing costs help more lower-income seniors obtain affordable housing and care at The Berkeley?

05

10

Other Counties & Municipalities :

Currently the following NC Counties/Municipalities have approved working with PASHF:

Cabarrus County: Unanimously Approved
Town of Mills River: Unanimously Approved

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11

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LEGALS

Legal Notices

BURKE COUNTY BOARD OF COMMISSIONERS NOTICE OF PUBLIC HEARINGS OCTOBER 19, 2026

The Burke County Board of Commissioners will hold a public hearing at 6:00 p.m. or as soon as public comments can be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following matters:

Development Agreement – Clover Ridge Subdivision
Parties: Burke County, City of Morganton, and Western Carolina Developers, LLC
Property: PINs 1794175470 and 1794175020
Location: City of Morganton

A public hearing will be conducted on a proposed development agreement for the Clover Ridge Subdivision

The proposed development agreement governs a phased residential development anticipated to include approximately 25 single-family lots. A copy of the proposed development agreement is available for public inspection in the office of the Clerk to the Board of Commissioners, 200 Avery Avenue, Morganton, NC, and online at www.burkenc.org.

Questions regarding the development agreement may be directed to the County Manager's Office at 828-764-9350. If a reasonable ADA accommodation is needed to participate in the public meeting, please contact the County Manager's Office by October 16, 2026, at 828-764-9350.

Publish: October 8 and October 15, 2026

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

Notice is hereby given that the Burke County Board of Commissioners will hold a public hearing at 6:00 p.m., or as soon thereafter as the matter may be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St., Morganton, NC (Door E), regarding Burke County's proposed participation in the North Carolina Commercial Property Assessed Capital Expenditure (C-PACE) Program.

The North Carolina C-PACE Program is a statewide program that allows eligible owners of qualifying commercial properties to obtain private financing for qualifying improvements, including energy efficiency, renewable energy, resiliency, and water conservation improvements. C-PACE financing is secured through a voluntary assessment and lien on the qualifying property.

The Burke County Board of Commissioners previously adopted a Resolution of Intent on September 21, 2026 declaring the County's intent to participate in the North Carolina C-PACE Program. Following the public hearing, the Board may consider adoption of a resolution authorizing Burke County to join the C-PACE Program.

Interested persons are invited to attend the public hearing and provide comments regarding Burke County's proposed participation in the C-PACE Program.

If reasonable ADA accommodations are needed to participate in the public hearing, please contact the County Manager's Office at 828-764-9350 by October 16, 2026.

Publish: October 8 and 15, 2026.

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

The Burke County Board of Commissioners will hold two public hearings at 6:00 p.m. or as soon as public comments can be heard, on October 19th, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following zoning-related matters:

Zoning Map Amendment - ZMA 2026-04
Request: Request to rezone a parcel of land from the Residential Three (R-3) District to the General Business (G-B) District
Applicant: Bryson Carlton
Property: PIN 1791162409
Address: 2763 US 64, Morganton NC, 28655, Burke County

Zoning Map Amendment - ZMA 2026-05
Request: Request to rezone a parcel of land from the Residential Two (R-2) District to the General Business (G-B) District
Applicant: Chad Huffman
Property: PIN 2762852471
Address: 7857 Old NC 10, Hickory NC, 28602, Burke County

Questions regarding these matters may be directed to the Community Development Department at 828-764-9030. If reasonable ADA accommodations are needed to participate in the public hearings, please contact the County Manager's office by October 16th, 2026, at 828-764-9350.

Publish: October 8 and 15, 2026.



TRIPLE COMMUNITY FIRE DEPT., INC. NOTICE OF BUDGET MEETING

Triple Community Fire Department's budget meeting, scheduled for Oct. 20th at 6:30PM. The meeting will take place at the fire department, located at 505 Mountain View Drive in Morganton.
Publish: Oct. 3, Oct. 10, Oct. 17.

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Legal Notices

NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that on October 19th, 2026, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), will be held by the Board of Commissioners of the County of Burke, North Carolina (the "County") with respect to the issuance by the Public Finance Authority (the "Authority"), a commission organized under and pursuant to Sections 66.0301, 66.0303, and 66.0304 of the Wisconsin Statutes, of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"). The Authority will loan the proceeds of the Bonds to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Code, to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), including the community located in the County described below, to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds.

The hearing will commence at 6:00 p.m., or as soon thereafter as the matter can be heard, at the County Board Room, 110 North Green Street (Entrance E), Morganton, North Carolina 28655. Notice is being given pursuant to Treasury Regulations Section 1.147(f)-1(d)(4)(iii).

The community located in the County is The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655 (the "Project"). The Project is owned and operated by the Borrower or by a single-member limited liability company of which the Borrower is the sole member. The maximum aggregate principal amount of the Bonds to be issued to finance the acquisition of the Project, together with the other communities comprising the Portfolio, is $115,000,000, of which not more than $25,000,000 is allocable to the financing of the acquisition of the Project. The Bonds are expected to constitute "qualified 501(c)(3) bonds" within the meaning of Section 145(a) of the Code.

The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents. The Bonds will not constitute a debt, liability, or obligation of the County, and the County assumes no financial responsibility for the Bonds by taking the action described in this notice.

The hearing will provide a reasonable opportunity to be heard for persons wishing to express their views on the merits of the issuance of the Bonds and the financing thereby of the Project. All interested parties are invited to present comments at the public hearing.

/s/ MORGAN BUCHANAN
Clerk to the Board of Commissioners
County of Burke, North Carolina

Published: October 8th and 15th , 2026

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LEGAL NOTICES

Notice to Creditors - Shelba Jean Mull

NORTH CAROLINA, BURKE COUNTY

File No: 26E000807-110

Having qualified as Co-Executor of the Estate of Shelby Jean Mull A/K/A Shelba Jean Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

April Denise Williams, Co-Executor
P.O. Box 1825, Morganton, NC 28680
David Clyde Mull, Co-Executor
P.O. Box 1825, Morganton, NC 28680

Attorney
Daniel Law Firm, P.A.
P.O. Box 1825
Morganton, NC 28680
828-433-0700
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800474

Legals

Casey Winebarger Pope

NORTH CAROLINA, BURKE COUNTY

File No: 26E000779-110

Having qualified as Executor of the Estate of Clay June Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

Gary D. Mull, Executor
115 Searcy Street, Morganton, NC 28655

Attorney
Casey W. Pope
P.O. Box 218
Hickory, NC 28603
828-322-7741
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800475

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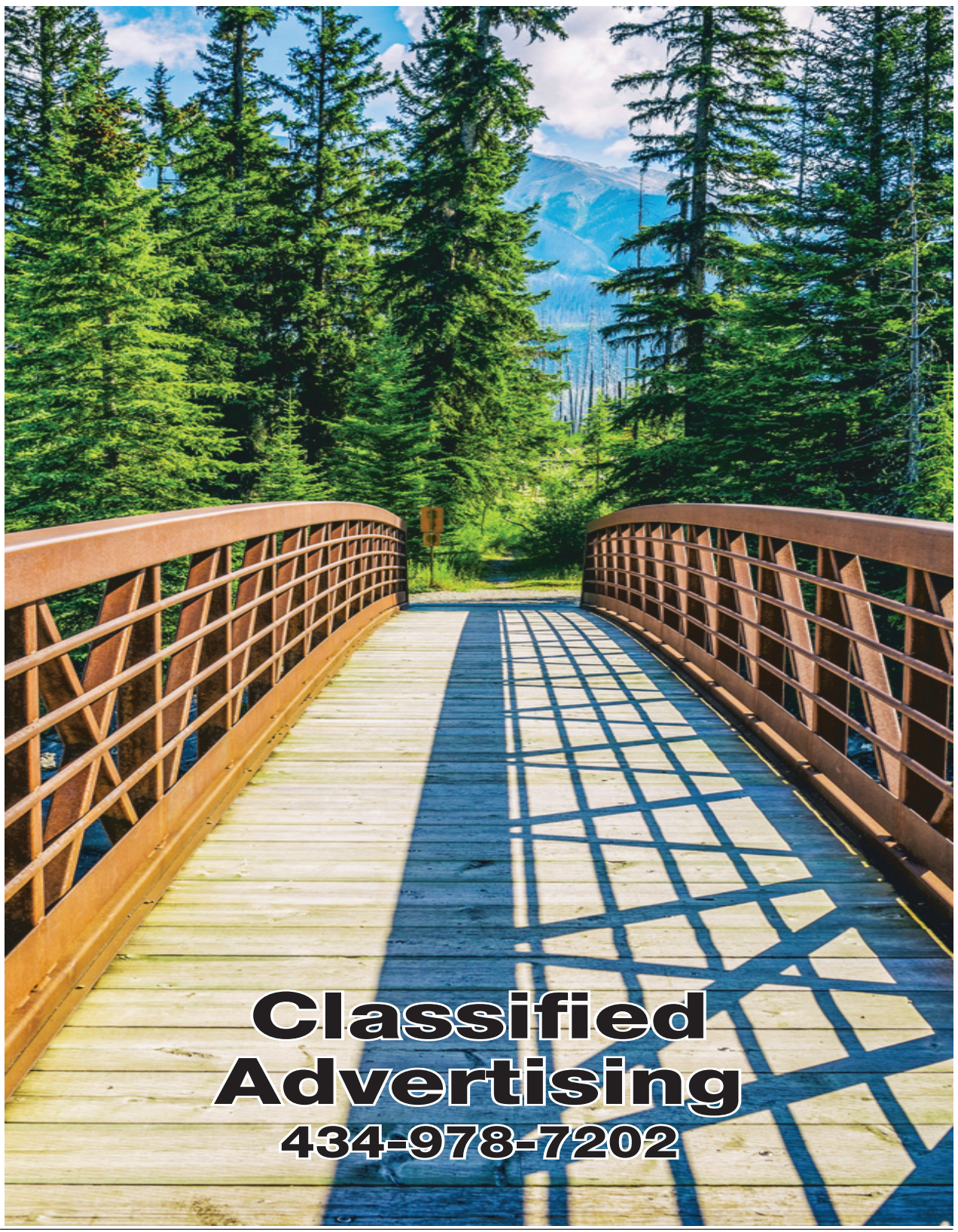

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NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that on October 19th, 2026, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), will be held by the Board of Commissioners of the County of Burke, North Carolina (the "County") with respect to the issuance by the Public Finance Authority (the "Authority"), a commission organized under and pursuant to Sections 66.0301, 66.0303, and 66.0304 of the Wisconsin Statutes, of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"). The Authority will loan the proceeds of the Bonds to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Code, to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), including the community located in the County described below, to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds.

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The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents. The Bonds will not constitute a debt, liability, or obligation of the County, and the County assumes no financial responsibility for the Bonds by taking the action described in this notice.

The hearing will provide a reasonable opportunity to be heard for persons wishing to express their views on the merits of the issuance of the Bonds and the financing thereby of the Project. All interested parties are invited to present comments at the public hearing.

/s/ MORGAN BUCHANAN
Clerk to the Board of Commissioners
County of Burke, North Carolina

Published: October 8th and 15th , 2026

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

SCHEDULED PUBLIC HEARINGS

Subject Title: **CM - Clover Ridge Subdivision Development Agreement and MOU**

Presented by: **Brian Epley, County Manager**

Summary of Information: Burke County, the City of Morganton, and Western Carolina Developers, LLC are proposing a development agreement for the Clover Ridge Subdivision, involving properties identified as PINs 1794175470 and 1794175020 in the City of Morganton. The proposed agreement governs a phased residential development anticipated to include approximately 25 single-family lots. The Burke County Board of Commissioners will conduct a public hearing to receive comments regarding the proposed development agreement prior to considering approval of the agreement.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: At the time of agenda distribution, the County Attorney's Office is still reviewing the proposed action for compliance with applicable local, state, and federal laws.

Suggested Motion: Motion to approve the Development Agreement and Memorandum of Understanding for the Clover Ridge Subdivision between Burke County, the City of Morganton, and Western Carolina Developers, LLC. Further, to authorize the County Manager or Chairman to execute the Development Agreement and MOU.

or

Motion to deny the Development Agreement and Memorandum of Understanding for the Clover Ridge Subdivision between Burke County, the City of Morganton, and Western Carolina Developers, LLC. Further, to authorize the County Manager or Chairman to execute the Development Agreement and MOU.

STATE OF NORTH CAROLINA	)	
	)	**DEVELOPMENT AGREEMENT**
COUNTY OF BURKE	)	**(CLOVER RIDGE SUBDIVISION)**

This DEVELOPMENT AGREEMENT (the "Agreement") is made and entered into this ____ day of September, 2026 (the "Effective Date") by and among Burke County, North Carolina (the "County") and the City of Morganton (the "City") (together the "Local Governments") and Western Carolina Developers, LLC, a North Carolina Limited Liability Company ("Developer") (the three of which may collectively be referred to as the "Parties").

STATEMENT OF PURPOSE

1. N.C.G.S. § 160D-1001(a)(1) provides that "[d]evelopment projects often occur in multiple phases over several years, requiring a long-term commitment of both public and private resources."

2. N.C.G.S. § 160D-1001(a)(3) provides that "[b]ecause of their scale and duration, such projects often require careful coordination of public capital facilities planning, financing, and construction schedules and phasing of the private development."

3. N.C.G.S. § 160D-1001(a)(4) provides that "[s]uch projects involve substantial commitments of private capital, which developers are usually unwilling to risk without sufficient assurances that development standards will remain stable through the extended period of the development."

4. N.C.G.S. § 160D-1001(a)(5) provides that "[s]uch developments often permit communities and developers to experiment with different nontraditional types of development concepts and standards, while still managing impacts on the surrounding areas."

5. N.C.G.S. § 160D-1001(a)(6) provides that "[t]o better structure and manage development approvals for such developments and ensure their proper integration into local capital facilities programs, local governments need flexibility to negotiate such developments."

6. In view of the foregoing, N.C.G.S. § 160D-1001(b) and N.C.G.S. § 160D-1003 expressly authorize local governments and agencies to enter into development agreements with developers pursuant to the procedures and requirements of Sections 160D-1001 through 160D-1012 of the North Carolina General Statutes (the "Act"), which procedures and requirements include approval of the development agreement by the governing body of the local government by ordinance after a duly noticed public hearing.

7. N.C.G.S. § 160D-1004 provides that "[a] local government may enter into a development agreement with a developer for the development of property as provided in this Article for developable property of any size, and that "[d]evelopment agreements shall be of a reasonable term specified in the agreement."

8. N.C.G.S. § 160D-1006(d) provides that "[t]he development agreement also may cover any other matter, including defined performance standards, not inconsistent with this Chapter," and that "[t]he development agreement may include mutually acceptable terms regarding provision of public facilities and other amenities and the allocation of financial responsibility for their provision, provided any impact mitigation measures offered by the developer beyond those that could be required by the local government shall be expressly enumerated within the agreement, and provided the agreement may not include a tax or impact fee not otherwise authorized by law."

9. N.C.G.S. § 160D-1006(a) provides that a development agreement "shall, at a minimum, include . . . [a] description of public facilities that will serve the development, including who provides the facilities, the date any new public facilities, if needed, will be constructed, and a schedule to assure public facilities are available concurrent with the impacts of the development," and that "[i]n the event that the development agreement provides that the local government shall provide certain public facilities, the development agreement shall provide that the delivery date of such public facilities will be tied to successful performance by the developer in implementing the proposed development, such as meeting defined completion percentages or other performance standards."

10. N.C.G.S. § 160D-1006(c) expressly contemplates that more than one local government may be made party to a development agreement, so long as the agreement specifies "which local government is responsible for the overall administration of the development agreement."

11. The County will pay to the City for disbursement to the Developer a grant in the amount of Three Hundred Thousand and 00/100 Dollars ($300,000.00) subject to the terms and conditions of this Development Agreement. This grant funding will be paid to the City contemporaneously with the execution of this Development Agreement for disbursement to the Developer, and the Developer will execute a corresponding Deed of Trust in favor of the Local Governments upon disbursement by the City of the grant funds to the Developer.

BACKGROUND

1. Developer is the owner of certain real property located at 0 Latimer Lane and 309 Latimer Lane in the City of Morganton, located in Burke County, that is comprised of the properties with Burke County Real Estate ID ("REID") Numbers 54475 and 40571 and Parcel Identification Numbers ("PINs") 1794175470 and 1794175020 (the "Property"), and said Property is described in an instrument recorded in Deed Book 2846, Page 86, Burke County Public Registry.

2. Developer desires to develop a phased development called Clover Ridge (the "Project") which potentially consists of thirty (30) lots, and the Developer ultimately anticipates that the Project will produce at least twenty-five (25) buildable single-family residential lots each greater than 20,000 square feet in size in accordance with the terms of this Agreement and the City of Morganton, North Carolina Zoning Ordinance (the "Ordinance"). The

Project will contain, among other things, single-family detached dwelling units and associated streets and utilities. The proposed homes are expected to average $300,000 in estimated taxable assessed value, creating an estimated $7.5 million in taxable base to the City and the County at full buildout of the twenty-five (25) single-family residential homes. The County will pay to the City for disbursement to the Developer a grant in the amount of Three Hundred Thousand and 00/100 Dollars ($300,000.00) (the "Grant"), subject to the terms and conditions of this Development Agreement. The Grant funding will be paid to the City contemporaneously with the execution of this Development Agreement for disbursement to the Developer, and the Developer will execute a corresponding Deed of Trust in favor of the Local Governments upon disbursement by the City of the Grant funds to the Developer.

3. After careful review and deliberation, the City has determined that the Project is consistent with the Ordinance, and the Local Governments have determined that the Project is consistent with the Act and that it would further the health, safety, welfare, and economic well-being of the residents of the Local Governments.

4. The Local Governments have determined that the Project will secure quality planning and growth, strengthen the tax base, and provide infrastructure. Accordingly, the Developer and the Local Governments desire to enter into this Agreement for the purposes of coordinating certain details of the Project and providing assurances to Developer, and any successors in interest, that Developer may proceed with the development of the Project in accordance with the terms of this Agreement and the approvals set forth herein without encountering future changes in ordinances, regulations or policies that would affect Developer's ability to develop the Project under the terms of this Agreement.

5. Pursuant to N.C.G.S. § 160D-1005, the governmental bodies of the City and the County each conducted public hearings, the City's on September 14, 2026 and the County's on September 21, 2026, to consider the approval and execution of this Agreement in accordance with the procedures set out in N.C.G.S. § 160D-602. The notice of hearing specified, among other things, the location of the Property that is the subject of this Agreement, the development uses proposed on the Property, and a place where a copy of the Agreement can be obtained. At the conclusion of each public hearing, the City Council and County Board of Commissioners, respectively, each approved this Agreement and authorized each respective body to execute the same. The City and the County may each execute the Agreement on a date subsequent to the public hearing.

TERMS

NOW, THEREFORE, in consideration of the terms and conditions set forth herein and in consideration of the mutual promises and assurances provided herein, the receipt and sufficiency of such consideration being acknowledged by the Parties, the Parties do hereby agree as follows:

1. **Incorporation.** The above recitals are incorporated in this Agreement as if the recitals were set out in this Agreement in their entirety.

2. **Definitions.** Capitalized terms in this Agreement shall have the meanings assigned to them below or the meanings assigned to them elsewhere in this Agreement.

   A. "Agreement" means this Development Agreement.

   B. "Developer" means Western Carolina Developers, LLC, a North Carolina Limited Liability Company, and any successors in title to the Property who may undertake development of the Property/the Project.

   C. "Property" means that real property located at 0 Latimer Lane and 309 Latimer Lane in the City of Morganton, located in Burke County, that is comprised of the properties with Burke County Real Estate ID ("REID") Numbers 54475 and 40571 and Parcel Identification Numbers ("PINs") 1794175470 and 1794175020, and said Property is described in an instrument recorded in Deed Book 2846, Page 86, Burke County Public Registry. The Property was conveyed to Developer pursuant to the Deed recorded at Book 2846, Page 86, in the Burke County Public Registry.

   D. "Grant" is the funding in the amount of Three Hundred Thousand and 00/100 Dollars ($300,000.00) payable to the City for disbursement to the Developer subject to the terms and conditions of this Development Agreement and the Deed of Trust referenced herein.

3. **Sewer and Water Systems/Sewer and Water Connections**.

   A. The sewer and water systems and extensions for the Project shall be the responsibility of the Developer and shall be designed to the City's specifications and subject to the City's connection charges.

   B. The sewer and water systems for the Project shall be subject to approval by the City (and the North Carolina Department of Environmental Quality, if required).

   C. The County is the local government responsible for overall administration of this Agreement pursuant to N.C.G.S. § 160D-1006(c). However, the City will act as the lead agency for approvals for the design, permitting, and construction of the Project.

4. **Sewer Capacity Reservation.** The City shall take into account the homes and amenities planned for the Project and shall reserve sufficient sewer treatment capacity within its sewer system to supply adequate quantities of sewer treatment services for the possible thirty (30) residential dwelling units to the extent necessary for the Developer to obtain certificates of occupancy for such number of dwellings (the "Guaranteed Capacity"). The City shall maintain the Guaranteed Capacity for the term of this Agreement, unless this Agreement is terminated earlier pursuant to its term. The Guaranteed Capacity may be increased by amendment to this Agreement.

5. **Connection to the City's Sewer System.** Upon the request of Developer, the City agrees to permit the physical connection of the Project to the City's sewer and water system provided that the Developer has constructed sewer and water pipes/system pursuant to City specifications, and provided that the Developer pays the required connection fees to the City.

6. **Grant to the City for Disbursement to the Developer.** The County will pay to the City for disbursement to the Developer the Grant funding in the amount of Three Hundred Thousand and 00/100 Dollars ($300,000.00) subject to the terms and conditions of this Development Agreement, including but not limited to the Development Obligations, Permitted Uses, Development Schedule, Infrastructure Improvements, and Performance Standards set forth hereinbelow. This Grant funding will be paid to the City contemporaneously with the execution of this Development Agreement for disbursement to the Developer, and the Developer will execute a corresponding Deed of Trust in favor of the Local Governments upon disbursement by the City of the Grant funds to the Developer.

7. **Development Obligations.** The Developer shall develop the Property to the following specifications:

   A. **Permitted Uses and Density.** The Property shall be developed solely for single-family residential uses, consistent with the Ordinance. Accessory uses incidental to residential development are permitted.

   B. **Development Schedule.** The Developer shall commence site development for the Project within six (6) months of the Effective Date of this Agreement. The Developer shall submit progress reports to the Local Governments at least once every six months or more frequently upon request by the City or the County.

   C. **Infrastructure Improvements by Developer.** The Developer shall, at its expense, install all on-site infrastructure, including the extension of an existing street and creation of a new loop street, construction of the sanitary sewer and water pipes/system, stormwater management, and utilities. Such improvements shall be in compliance with City specifications and shall dedicated to the City upon completion.

   D. **Performance Standards.** The Developer shall develop the Property to City specifications and at least these following specifications:

      i. Developer shall construct and complete at least twenty-five (25) single-family residential dwellings within the Project. A single-family residential dwelling is "completed" once a certificate of occupancy for the dwelling has been issued. The single-family residential dwellings shall each be constructed such that each lot on which a residential dwelling is located shall have an estimated taxable assessed value of at least $300,000 once the single-family residential dwelling is completed.

ii. If the Developer has not completed at least twenty-five (25) residential dwellings within the Project by the date that is three (3) years from the Effective Date of this Agreement, then the Developer shall make a payment to the County (the "Performance Payment"). The Performance Payment to each of the County shall be calculated as follows: for each residential dwelling less than the twenty-five (25) required dwelling units that the Developer has not completed by the date that is three (3) years after the Effective Date of this Agreement, the Developer shall pay to the County the amount of Twelve Thousand and 00/100 Dollars ($12,000.00) for each/per dwelling unit not completed. By way of illustration, if on the date that is three years after the Effective Date of this Agreement, the Developer has completed only twenty-two (22) single-family residential dwellings in the Project (that is, three less than the required 25 single-family residential dwellings), the Developer shall be liable to and shall pay to the County the amount of Thirty-Six Thousand and 00/100 Dollars ($36,000.00).

iii. The purpose of the Performance Payment(s) is to partially compensate the County for their investment in the Project if the Project is not developed in the manner required by this Agreement.

iv. To secure the Developer's obligations under this Agreement, including but not limited to the Developer's obligation to pay the Performance Payment(s) to the County, if such becomes due and payable, the Local Governments shall have a Deed of Trust on the Property. Contemporaneously with the execution of this Development Agreement and the disbursement of the Grant funds, the Developer shall execute and deliver to the Local Governments a Deed of Trust in recordable form, substantially in the form attached hereto as Exhibit "A" or otherwise acceptable to the Local Governments, granting the Local Governments a security interest in the Property to secure the obligations of the Developer to pay any Performance Payment(s) that come due and payable under this Agreement. The Parties agree that the Deed of Trust shall be subordinate to any Deed of Trust which the Developer executes in connection with its construction lender. The Deed of Trust shall be recorded in the office of the Burke County Register of Deeds promptly following the execution of this Agreement. The Deed of Trust shall remain in full force and effect until the Developer has fully performed all obligations under this Agreement and/or paid all applicable Performance Payments, at which time the Local Governments shall, upon the Developer's written request, execute and deliver a release of the Deed of Trust in recordable form. The Parties shall also coordinate partial releases from the Deed of Trust as to any individual lots on which dwellings have been constructed that are sold to single-family owners. In the event of default by the Developer, the Local Governments may exercise all remedies available under the Deed of Trust and applicable law, including foreclosure to recover any Performance Payment(s) for

which the Developer is liable to the Local Governments but has not paid. The Developer hereby represents that nothing prohibits the Developer from executing the Deed of Trust in favor of the Local Governments, and that any and all of the Developer's lenders for this Project/Property have consented to the Deed of Trust or that such consent will be obtained.

8. **Amendment.** The terms of this Agreement may be amended by the mutual consent of the Parties hereto or their successors in interest. A major modification of the terms of this Agreement shall follow the same procedures as required for the initial approval of this Agreement, which procedures shall include a public hearing.

9. **Recordation/Binding Effect.** Within fourteen (14) days after the Local Governments and the Developer enter into this Agreement, the Developer shall record this Agreement in the Burke County Public Registry. The terms, provisions, obligations and burdens of this Agreement shall be binding upon, and the benefits of this Agreement shall inure to, all successors in interest to the parties thereto.

10. **Periodic Review by the County.** The Planning Director or other County Manager designee shall conduct a periodic review (the "Periodic Review") of the progress and status of the Project at least every 6 months, at which time the Developer shall be required to demonstrate good faith compliance with the terms of this Agreement. If, as a result of the Periodic Review, the County finds and determines that the Developer has committed a material breach of the terms or conditions of the Agreement, the County shall serve a notice in writing, within a reasonable time after the Periodic Review, upon the Developer setting forth with reasonable particularity the nature of the breach(es) and the evidence or circumstances supporting the determination, and providing the Developer a reasonable time in which to cure the material breach(es).

11. **Default.** The following default provisions are applicable to this Agreement, in addition to any other provisions of this Agreement related to any parties' breach or default hereunder.

    A. The failure of the Developer or the Local Governments to comply with the terms of this Agreement shall constitute a default, entitling the non-defaulting party or parties to pursue such remedies as allowed under applicable law against the defaulting party, provided, however, that no termination of this Agreement may be declared by either of the Local Governments as to the Developer absent its affording to the Developer notice and an opportunity to cure following the Periodic Review as provided in Section 10 above. In addition to any other rights or remedies, any party may institute legal action against a defaulting party to cure, correct, or remedy any default or breach, to specifically enforce any covenants or agreements set forth in the Agreement or to enjoin any threatened or attempted violation of the Agreement, or to obtain any remedies consistent with the purposes of the Agreement. Legal actions shall be instituted in the trial Courts of the County of Burke, State of North Carolina, and the Parties hereto hereby agree to and do submit themselves to the personal jurisdiction of such courts without application of any conflicts of laws provisions of any jurisdiction.

B. In the event that the Developer fails to perform any of its covenants, commitments, and obligations hereunder after notice of a breach(es) and an opportunity to cure, the Local Governments may, until such default is cured, withhold the issuance of any further building permits for homes within the Project or withhold the issuance of certificates of occupancy for any homes within the Project that have not been purchased or have not been placed under contract for sale.

C. In the event that it becomes necessary for either or both of the Local Governments to pursue a civil action against the Developer and the Local Government(s) instituting such action is/are the prevailing party in such action, then the Local Government(s) instituting such action shall be entitled to recover its/their reasonable attorneys' fee from the Developer.

12. **Notices.** Any notice, demand, request, consent, approval, or communication which a signatory party is required to or may give to another signatory party hereunder shall be in writing and shall be delivered or addressed to the other party or Parties at the address(es) below set forth or to such other address(es) as such party may from time to time direct by written notice given in the manner herein prescribed. Such notice or communication shall be deemed to have been given or made when communicated by personal delivery or by independent courier service or by facsimile or if by mail on the fifth (5th) business day after the deposit thereof in the United States Mail, postage prepaid, registered, or certified, addressed as hereinafter provided. Parties shall make reasonably inquiry to determine whether the names of the persons listed in this Agreement should be substituted with the name of the listed person's successor. All notices, demands, requests, consents, approvals, or communications to the Parties shall be addressed as follows:

To the County:

Mr. Brian Epley
Burke County Manager
200 Avery Avenue
Morganton, NC 28655
Brian.epley@burkenc.org

With copies to:

Bradley Kirkley, Planning Director
P.O. Box 219
Morganton, NC 28680

Mr. Destin Hall
Burke County Attorney
606 College Ave. SW
Lenoir, NC 28645

To the City:

Sally Sandy, City Manager

Physical Address:
305 E. Union Street
Suite A100
Morganton, NC 28655

Mailing Address:
P.O. Box 3448
Morganton, NC 28680
Email in care of: rccarswell@morgantonnc.gov

With copies to:

Keith Rigsbee, City Attorney
Wendy Smith, Director of Development and Design Services
Physical and Mailing Addresses are the same as above
Emails: krigsbee@morgantonnc.gov and wsmith@morgantonnc.gov

To the Developer:

Western Carolina Developers, LLC
Attention: _____
400 Center Court Drive
Boone, NC 28607
Email: _____

With copies to:

_____

13. **Entire Agreement.** This Agreement sets forth and incorporates by reference all of the agreements, conditions, and understandings between and among the Local Governments and the Developer, and there are no promises, agreements, conditions, or understandings, oral or written, expressed or implied, among these parties relative to the matters addressed herein other than as set forth or as referred to herein or as contained in the Ordinance or as expressed in the development conditions applicable to these parcels of land. Provided, however, the County and the City may, before, contemporaneously with, or after the Effective Date of this Agreement, enter into a Memorandum of Understanding (the "MOU") concerning their administration of this Agreement, provided that such MOU does not conflict with the terms of this Agreement.

14. **Construction.** The Parties agree that each party and its counsel have reviewed and revised the Agreement and that any rule of construction to the effect that ambiguities are to be

resolved against the drafting party shall not apply in the interpretation of this Agreement or any amendments or exhibits thereto.

15. **Assignment.** After notice to the Local Governments, the Developer may assign its rights and responsibilities hereunder to all or any portion of the Property, provided that no assignment as to a portion of the relevant parcel of land will relieve the assigning party of responsibility with respect to the remaining portion of the relevant parcel of land owned by the assigning party without the written consent of the Local Governments.

16. **Term.** This Agreement shall terminate on the date that is fifteen (15) years after the Effective Date of this Agreement or the date on which the Developer has met or exceeded all of its Development Obligations under this Agreement including Section 7 hereof, whichever is sooner.

17. **Governing Law.** This Agreement shall be governed by the laws of the State of North Carolina.

18. **Counterparts.** This Agreement may be executed in several counterparts, each of which shall be deemed an original, and such counterparts shall constitute one and the same instrument.

19. **Agreement to Cooperate.** In the event of any legal action instituted by a third party or other governmental entity or official challenging the validity of any provision of this Agreement, the Parties hereby agree to cooperate in defending such action; provided, however, each party shall retain the right to pursue its own independent legal defense.

20. **Agreement to Run with the Land.** This Agreement shall be recorded in the Burke County Public Registry. The Agreements contained herein, including but not limited to the development and other obligations set forth in Section 7 hereof, shall be deemed to be a lien upon, binding upon and run with the Property and shall be binding upon and be an obligation of all successors to and in the ownership of the Property.

21. **Severability.** If any term or provision herein shall be judicially determined to be void or of no effect, such determination shall not affect the validity of the remaining terms and provisions. If a court of competent jurisdiction determines that any procedure was not followed in the execution and approval of this Agreement, the parties shall cooperate to promptly rectify such procedural defect, and such shall not be a basis for any party to claim that they are not subject to this Agreement.

22. **Authority.** Each party represents that it has undertaken all actions necessary for corporate or public approval of this Agreement, and that the person signing this Agreement has the authority to bind the Developer, the City, or the County, as the case may be.

[SIGNATURE PAGES TO FOLLOW]

FOR BURKE COUNTY

Signature: _____ Date: _____

Printed Name: _____

Title: Chairman, Board of Commissioners

Attestation: _____ Date: _____

Printed Name: _____

[SEAL]

Title: Clerk to the Board of Commissioners

FOR THE CITY OF MORGANTON

Signature: Ronnie Thompson Date: 9/14/2026

Printed Name: Ronnie Thompson

Title: Mayor, City of Morganton

Attestation: Renee Carswell Date: 9/14/2026

Printed Name: Renee Carswell

Title: Clerk to the City Council

[SEAL]

CITY OF MORGANTON CORPORATE SEAL NORTH CAROLINA

WESTERN CAROLINA DEVELOPERS, LLC

Signature: _____ Date: _____

Printed Name: _____

Title: President

Signature: _____ Date: _____

Printed Name: _____

Title: Secretary

[NOTARY ACKNOWLEDGMENTS TO FOLLOW]

State of North Carolina

County of Burke

I, the undersigned Notary Public for the County and State above referenced, certify that _____ [Name of Chairman] personally appeared before me this day, acknowledging to me that he/she is the Chairman of the BURKE COUNTY Board of Commissioners, and that by authority duly given and as the act of this entity, (_____ [Name of Chairman] signed in its name by its Chairman and attested by _____ [Name of Clerk] as its Clerk) signed the foregoing instrument in its name and on its behalf as its act and deed.

Witness my hand and official stamp or seal, this the ___ day of _____, 2026.

_____
Notary Public

My commission expires: _____

****

State of North Carolina

County of Burke

I, the undersigned Notary Public for the County and State above referenced, certify that Ronnie Thompson, personally appeared before me this day, acknowledging to me that he is the duly elected Mayor of the CITY OF MORGANTON, and that by authority duly given and as the act of this entity, (Ronnie Thompson signed in its name by its Mayor and attested by Renee Carswell as its Clerk) signed the foregoing instrument in its name and on its behalf as its act and deed.

Witness my hand and official stamp or seal, this the 14th day of September, 2026.

Jessica Lowman
Notary Public

My commission expires: 2/26/2030

JESSICA LOW NOTARY PUBLIC BURKE COUNTY, N.C.

State of North Carolina

County of Burke

I, the undersigned Notary Public for the County and State above referenced, certify that _____ [Name of President] and _____ [Name of Secretary] personally appeared before me this day, and acknowledged that they are the President and Secretary of WESTERN CAROLINA DEVELOPERS, LLC, and that by authority duly given and as the act of this entity, they signed the foregoing instrument in its name and on its behalf as its act and deed.

Witness my hand and official stamp or seal, this the ___ day of _____, 2026.

_____
Notary Public

My commission expires: _____

EXHIBIT A

NORTH CAROLINA

DEED OF TRUST

BURKE COUNTY

This Deed of Trust (the "Deed of Trust") is made as of September _____, 2026, by Western Carolina Developers, LLC, a North Carolina Limited Liability Company (the "Grantor" or the "Developer"), to Keith W. Rigsbee, Trustee ("Trustee"), for the benefit of Burke County, North Carolina, and the City of Morganton, North Carolina (together, the "Beneficiaries" or the "Local Governments").

Recitals

The Developer, Burke County, and the City of Morganton have entered into a Development Agreement for the Clover Ridge Subdivision (the "Three-Party Development Agreement"), pursuant to which the County will pay to the City for disbursement to the Developer a grant in the amount of Three Hundred Thousand and 00/100 Dollars ($300,000.00), and the Developer will execute a corresponding Deed of Trust in favor of the Local Governments upon disbursement by the City of the grant funds to the Developer.

The Property subject to this Deed of Trust consists of real property located at 0 Latimer Lane and 309 Latimer Lane in the City of Morganton, Burke County, comprised of Burke County Real Estate ID Numbers 54475 and 40571 and Parcel Identification Numbers 1794175470 and 1794175020, described in a deed recorded in Deed Book 2846, Page 86, Burke County Public Registry, which conveyance was made to Developer. Developer has owned this property since on or about December 19, 2025, and represents that there is another Deed of Trust encumbering the property in favor of _____ in the amount of $_____.

The Three-Party Development Agreement requires that this Deed of Trust secure the Developer's performance of its obligations under that Agreement, including payment of any performance payments or other monetary obligations that become due thereunder, and contemplates coordination of partial releases for individual lots upon construction and sale to single-family owners, subordination to a construction lender's deed of trust, and foreclosure remedies upon default.

The Local Governments have also memorialized administration of the Three-Party Development Agreement in a Memorandum of Understanding.

Granting Clause; Conveyance in Trust with Power of Sale.

For good and valuable consideration, including the grant funding described in the Recitals above and the covenants herein, Grantor hereby grants, bargains, sells, conveys, and confirms unto Trustee, in trust, with power of sale, for the benefit of the Local Governments, all of Grantor's right, title, and interest in and to the following property (the "Property"):

1. The real property described in the attached "Exhibit A" and which is located in the City of Morganton, Morganton Township, Burke County, North Carolina, and consists of all of the properties described in the Deed recorded in Deed Book 2846, Page 86, Burke County Public Registry, being Burke County Real Estate ID Numbers 54475 and 40571 and Parcel Identification Numbers 1794175470 and 1794175020, together with all improvements thereon and all rights, privileges, and appurtenances thereunto belonging.

2. All easements, hereditaments, and appurtenances now or hereafter belonging or appertaining to the Property, and all reversions and remainders.

3. All rents, issues, and profits of the Property to the extent permitted by applicable law, and all awards, compensation, and settlements made in connection with any condemnation or eminent domain proceeding, or any damage to the Property, subject to the provisions of this Deed of Trust.

TO HAVE AND TO HOLD the Property unto Trustee, in trust, with power of sale, for the uses and purposes and upon the terms and conditions herein set forth.

Secured Obligations; Incorporation by Reference.

This Deed of Trust secures all obligations of the Developer under the Three-Party Development Agreement, including without limitation: (a) performance of all covenants, development obligations, and performance standards; (b) payment of any performance payments or other monetary obligations that become due thereunder; (c) reimbursement of Beneficiaries' costs and expenses, including reasonable attorneys' fees, incurred to enforce the Three-Party Development Agreement or this Deed of Trust;

and (d) all renewals, extensions, amendments, modifications, and replacements of the foregoing (collectively, the "Secured Obligations").

The Three-Party Development Agreement is incorporated herein by reference as if fully set forth, and this Deed of Trust is granted as the "corresponding Deed of Trust in favor of the Local Governments" referenced therein.

Covenants of Grantor.

Grantor covenants and agrees as follows for the benefit of Beneficiaries:

1. Payment and Performance. Grantor shall timely perform and comply with all Secured Obligations and all covenants herein.

2. Title; Further Assurances. Grantor is seized of and has good title to the Property and has the right to convey the same; Grantor shall, upon request, execute and deliver such further instruments as Beneficiaries reasonably request to confirm or perfect the lien and priority of this Deed of Trust, including financing statements or amendments.

3. Taxes and Assessments. Grantor shall pay, prior to delinquency, all taxes, assessments, and other governmental charges levied against the Property, subject to 4. Grantor's right to contest in good faith so long as no tax sale or loss of lien priority results.

4. Insurance. Grantor shall keep the improvements on the Property insured against loss by fire and other hazards, risks, and perils as are customarily insured against for similar properties, with coverage, deductibles, and insurers reasonably satisfactory to Beneficiaries, with standard mortgagee/loss-payee clauses in favor of Trustee and Beneficiaries, as their interests may appear.

5. Maintenance; No Waste. Grantor shall maintain the Property in good order and repair, shall not commit or permit waste, and shall promptly comply with all applicable laws, ordinances, regulations, and orders of any governmental authority having jurisdiction over the Property.

6. Liens and Priority. Grantor shall not create or permit any lien or encumbrance on the Property that is senior to this Deed of Trust, except as expressly permitted herein or in the Three-Party Development Agreement; Grantor may finance the Project with a construction lender, and, as contemplated in the Three-Party Development Agreement, this Deed of Trust may be subordinated to a deed of trust securing such construction financing pursuant to a written subordination acceptable to the Local Governments. The Parties have agreed in the Three-Party Development Agreement that this Deed of Trust shall be subordinate to a Deed of Trust which the Developer executes in connection with its construction lender for the Project/Property.

7. Condemnation and Insurance Proceeds. In the event of casualty or condemnation, insurance or condemnation proceeds shall be applied, at Beneficiaries' election consistent with applicable law and the Three-Party Development Agreement, to restoration of the Property or to the Secured Obligations; Grantor shall promptly notify Beneficiaries of any casualty, loss, or taking.

8. Protection of Security. If Grantor fails to perform any covenant or if Beneficiaries determine that action is reasonably necessary to protect the lien or the Property (including payment of taxes, assessments, insurance premiums, or sums to maintain, repair, or secure the Property), Beneficiaries may make such expenditures; all such sums, together with interest at the maximum lawful rate from the date of expenditure, shall be added to the Secured Obligations and secured hereby.

9. Indemnity. Grantor shall indemnify and hold Beneficiaries and Trustee harmless from and against loss, cost, damage, claim, liability, or expense (including reasonable attorneys' fees) arising out of or related to the Property, except to the extent caused by the gross negligence or willful misconduct of the indemnified party.

10. Inspection. Upon reasonable prior notice, Beneficiaries and their agents may enter upon and inspect the Property at reasonable times.

Events of Default.

Each of the following shall constitute an "Event of Default":

1. Failure by Grantor to perform any Secured Obligation when due or required. Failure by Developer to perform its covenants, commitments, or obligations under the Three-Party Development Agreement after notice and opportunity to cure following the periodic review required by that agreement constitutes a default thereunder, entitling the Local Governments to pursue remedies allowed by law and the Agreement

2. Any breach of a covenant in this Deed of Trust not cured within thirty (30) days after written notice (unless a shorter period for cure is set by the Three-Party Development Agreement which shorter period shall apply and control); or, if not reasonably curable within thirty (30) days or within the applicable cure period, failure to commence and diligently pursue cure to completion within a reasonable time.

3. Any transfer of all or any part of the Property in violation of the terms of this Deed of Trust or the Three-Party Development Agreement, if applicable.

4. The filing by or against Grantor of any bankruptcy or insolvency proceeding that is not dismissed within sixty (60) days, or an assignment for the benefit of creditors.

Remedies Upon Default.

Upon any Event of Default and after giving any applicable notice and opportunity to cure required by this Deed of Trust, the Three-Party Development Agreement or applicable law:

Beneficiaries may exercise all remedies available under the Three-Party Development Agreement and applicable law, including foreclosure to recover any performance payment(s) or other monetary obligations for which Developer is liable but has not paid to the Local Governments and the following remedies:

1. Acceleration. Beneficiaries may declare all Secured Obligations immediately due and payable.

2. Power of Sale. Trustee is authorized and empowered to sell the Property at public auction for cash to the highest bidder pursuant to the power of sale and in accordance with Chapter 45 of the North Carolina General Statutes, after compliance with all statutory requirements for foreclosure under a power of sale deed of trust. Trustee may sell the Property in one parcel, multiple parcels, or in such manner and order as Beneficiaries direct.

3.Judicial Foreclosure. Beneficiaries may elect to foreclose judicially.

4. Appointment of Substitute Trustee. Beneficiaries have the irrevocable power to appoint a substitute trustee by instrument recorded in the Burke County Public Registry. The Beneficiaries shall have the right to substitute the Trustee at all times, regardless of whether there has been an event of default or not.

5. Possession; Tenancy at Sufferance. Following foreclosure or other acquisition of title, Grantor shall become a tenant at sufferance and shall vacate upon demand or pay reasonable rental for use and occupancy as determined by the owner.

6. Application of Proceeds. The proceeds of any sale shall be applied in the following order: (a) to costs and expenses of sale, including Trustee's commission and reasonable attorneys' fees; (b) to sums expended by Beneficiaries under this Deed of Trust; (c) to the full amount of the Secured Obligations in such order as Beneficiaries determine; and (d) any surplus to the person(s) lawfully entitled thereto.

7. Cumulative Remedies. All remedies are cumulative and may be exercised concurrently or separately without one precluding another, to the extent permitted by law.

Releases; Satisfaction.

Upon sale of an individual lot within the Project and satisfaction of all applicable monetary obligations tied to that lot in accordance with the Three-Party Development

Agreement and the agreed release procedures, the Local Governments shall coordinate and execute a partial release of such lot from the lien of this Deed of Trust upon written request from Developer or the purchaser.

Upon full performance by Developer of all obligations under the Three-Party Development Agreement and payment of all amounts due thereunder, the Local Governments shall, upon Developer's written request, execute and deliver a release or satisfaction of this Deed of Trust suitable for recording in the Burke County Public Registry.

Notices.

Notices under this Deed of Trust shall be in writing and deemed given as provided in the Three-Party Development Agreement, addressed as follows:
To Burke County: Mr. Brian Epley, Burke County Manager, 200 Avery Avenue, Morganton, NC 28655; with copies to Bradley Kirkley, Planning Director, P.O. Box 219, Morganton, NC 28680; and Mr. Destin Hall, Burke County Attorney, 606 College Ave. SW, Lenoir, NC 28645.

To the City of Morganton: Sally Sandy, City Manager, Physical Address: 305 E. Union Street, Suite A100, Morganton, NC 28655; Mailing Address: P.O. Box 3448, Morganton, NC 28680; Email in care of: rccarswell@morgantonnc.gov; with copies to: Keith Rigsbee, City Attorney, and Wendy Smith, Director of Development and Design Services, at the same physical/mailing addresses; Emails: krigsbee@morgantonnc.gov and wsmith@morgantonnc.gov.

To Developer: Western Carolina Developers, LLC, Attention: _____, 400 Center Court Drive, Boone, NC 28607.

Any party may change its notice address by notice given in accordance with this section.

Miscellaneous.

1. North Carolina Law; Venue. This Deed of Trust shall be governed by and construed under the laws of the State of North Carolina. As provided in the Three-Party Development Agreement, any legal actions shall be instituted in the trial courts of Burke County, North Carolina, and the parties submit to the personal jurisdiction of such courts.

2. Successors and Assigns. This Deed of Trust shall bind Grantor and its successors and assigns and shall inure to the benefit of Beneficiaries and their successors and assigns.

3. No Waiver. No delay or omission by Beneficiaries or Trustee in exercising any right or remedy shall operate as a waiver thereof.

4. Severability. If any provision of this Deed of Trust is held invalid or unenforceable, the remaining provisions shall remain in full force and effect.

5. Headings. Headings are for convenience only and do not affect interpretation.

6. Remedies; Attorneys' Fees. Beneficiaries shall be entitled to recover their reasonable attorneys' fees and expenses to the extent permitted by law in connection with enforcement of this Deed of Trust and the Secured Obligations.

7. Trustee. Trustee accepts the trust created by this Deed of Trust and agrees to perform the duties herein provided. Beneficiaries may remove and replace Trustee and appoint a substitute trustee by written instrument duly recorded.

Execution; Acknowledgments.

IN WITNESS WHEREOF, Grantor has executed and sealed this Deed of Trust as of the date first above written.

Western Carolina Developers, LLC,
a North Carolina Limited Liability Company

By: _____
Name: _____
Title: Member / Manager

****

STATE OF NORTH CAROLINA
COUNTY OF BURKE

I, the undersigned Notary Public of the County and State aforesaid, certify that _____ personally appeared before me this day and acknowledged that he/she is a Member/Manager of Western Carolina Developers, LLC, a North Carolina limited liability company, and that by authority duly given and as the act of the company, the foregoing instrument was signed in its name by him/her as Member/Manager.

Witness my hand and official stamp or seal, this ____ day of _____, 2026.

_____
Notary Public

My Commission Expires: _____

****

After recording, please return the recorded original to:
Sally Sandy, City Manager, City of Morganton, P.O. Box 3448, Morganton, NC 28680-3444

Exhibit "A"
Legal Description

Being all of that real property as shown on that plat recorded in Plat Book 10 at Page 55, Burke County Registry, LESS AND EXCEPTING those lots numbered 1-5 and 49-60 as shown on said plat. Reference to said plat is hereby made for a more particular description of said property.

TOGETHER WITH and SUBJECT TO all easements, rights of way and restrictions of record and as shown on said plat.

BACK REFERENCE: Book 2846, Page 86, and Book 2581, Page 410, both of the Burke County Public Registry.

TAX ID#'s: 1794175470 & 1794175020

REID#'s: 54475 & 40571

State of North Carolina)
)
COUNTY OF BURKE)

MEMORANDUM OF UNDERSTANDING

This MEMORANDUM OF UNDERSTANDING (the "MOU") is made and entered into this ____ day of _____, 2026 (the "Effective Date") by and among Burke County, North Carolina (the "County"), and the City of Morganton (the "City") (together the "Local Governments").

RECITALS AND STATEMENT OF PURPOSE

1. The County, the City, and Western Carolina Developers, LLC (the "Developer") have entered into, or will soon enter into, a Development Agreement (the "Agreement") related to the development of the Clover Ridge Subdivision, a residential project (the "Project") on certain real property located within the corporate limits of the City.

2. Pursuant to the Agreement, the Local Governments have jointly committed to provide, financial assistance for infrastructure for public sewer and water (the "Utility Infrastructure").

3. The County desires to provide grant funding to the City to assist with the costs of the Utility Infrastructure and related infrastructure that will serve the Project.

4. The County has been designated in the Agreement as the local government responsible for the overall administration of the Agreement pursuant to N.C.G.S. § 160D-1006(c). However, the City will act as the lead agency for the permitting.

5. The Local Governments wish to memorialize their understanding as to how they will administer the Development Agreement.

TERMS

NOW, THEREFORE, in consideration of the terms and conditions set forth herein and in consideration of the mutual promises and assurances provided herein, the receipt and sufficiency of such consideration being acknowledged by the Local Governments, the Local Governments do hereby agree as follows:

1. **Incorporation.** The above recitals are incorporated in this Agreement as if the recitals were set out in this Agreement in their entirety.

2. **Definitions.** Capitalized terms in this Agreement shall have the meanings assigned to them below or the meanings assigned to them elsewhere in this Agreement.

A. "Agreement" means the Development Agreement entered into by the Local Governments and the Developer.

B. "Developer" means Western Carolina Developers, LLC, a North Carolina limited liability company, and its successors in title to the Property who undertake development of the Property or who are transferred Development Rights.

C. "Property" means that real property located in the City of Morganton, located in Burke County, that is comprised of all of the properties with Burke County Real Estate ID ("REID") Nos. 54475 and 40571 and Parcel Identification Numbers (PINs) 1794175470 and 1794175020, said properties having been conveyed to Developer pursuant to the deed recorded at Book 2846 Page 86 of the Burke County Public Registry.

3. **Grant of Funds by County.** The County shall pay to City grant funds totaling $300,000 for the City to disburse to the Developer to be used for the Utility Infrastructure costs of the Project.

4. **Use of Grant Funds.** The City shall disburse the Grant Funds to the Developer exclusively for the Utility Infrastructure and related improvements that serve the Project as described in the Development Agreement. Any grant funds not expended for such purposes shall be returned to the County within sixty (60) days after final completion of the Utility Infrastructure.

5. **Disbursement of Grant Funds.** The County shall disburse the Grant Funds to the City in one lump sum after execution of this MOU and the Three Party Development Agreement and upon request by the City Manager. The anticipated costs of the Developer for the Utility Infrastructure and related improvements has been provided to the Local Governments, and it exceeds $1.4 million.

6. **City Responsibilities.** The City shall be responsible for the inspection and for any acceptance of the Utility Infrastructure and related improvements.

7. **Reporting and Records.** The City shall maintain accurate records of the dispursement of the Grant Funds and shall provide the County with a report related to the Utility Infrastructure when is completed and all Grant Funds have been expended or returned.

8. **No Third-Party Beneficiaries.** This MOU is solely for the benefit of the County and the City. Nothing herein shall create any rights or obligations in or for the Developer or any other person or entity.

9. **Term and Termination.** This MOU shall remain in effect until the Utility Infrastructure is completed, all Grant Funds are accounted for, and any unexpended

funds are returned to the County, unless terminated earlier by mutual written agreement of the Local Governments. Provided, however, this MOU will terminate no later than December 31, 2036.

10. **Entire Agreement; Amendment.** This MOU and the Agreement constitutes the entire understanding between the Local Governments with respect to the subject matter hereof and supersedes all prior discussions or agreements, except for the Agreement. To the extent this MOU conflicts with any provision of the Agreement, the Agreement shall control. This MOU may only be amended in writing signed by both of the Local Governments.

11. **Governing Law.** This MOU shall be governed by the laws of the State of North Carolina.

12. **Counterparts.** This MOU may be executed in counterparts, each of which shall be deemed an original, and all of which together shall constitute one and the same instrument.

13. **Construction.** The Parties agree that each party and its counsel have reviewed and revised the Agreement and that any rule of construction to the effect that ambiguities are to be resolved against the drafting party shall not apply in the interpretation of this Agreement or any amendments or exhibits thereto.

14. **Assignment.** After notice to the Local Governments, the Developer may assign its rights and responsibilities hereunder to the subsequent land owners of all or any portion of the Property, in accordance with the provisions of the Agreement, provided that no assignment as to a portion of the relevant parcel of land will relieve the assigning party of responsibility with respect to the remaining portion of the relevant parcel of land owned by the assigning party without the written consent of the Local Governments. Subject to the provisions of applicable laws, in the event that the Developer sells all the Property and assigns its respective rights and responsibilities to a subsequent land owner, then the Developer shall be relieved of all of its covenants, commitments, and obligations hereunder, however the Project, the Property, and the assignee shall be obligated to comply with and be subject to the requirements of the Agreement.

15. **Severability.** If any term or provision herein shall be judicially determined to be void or of no effect, such determination shall not affect the validity of the remaining terms and provisions. This MOU shall not purport to supersede any provision of any applicable law.

[SIGNATURE PAGES TO FOLLOW]

FOR BURKE COUNTY

Signature: _____ Date: _____

Printed Name: Jeffrey C. Brittain

Title: Chairman, Board of Commissioners

Attestation: _____ Date: _____

Printed Name: Morgan Buchanan

Title: Clerk to the Board of Commissioners

[SEAL]

FOR THE CITY OF MORGANTON

Signature: Ronnie Thompson Date: 9/14/2026

Printed Name: Ronnie Thompson

Title: Mayor, City of Morganton

Attestation: Renee C Carswell Date: 9/14/2026

Printed Name: Renee C. Carswell

Title: Clerk to the City Council

[SEAL]

CITY OF MORGANTON CORPORATE SEAL NORTH CAROLINA

THE NEWS HERALD

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MARKETPLACE

TO PLACE AN AD - SELF-SERVE: https://morganton.com/place_an_ad **Call:** 434-978-7202

LEGALS AND PUBLIC NOTICE: legals.northcarolina@lee.net **Call:** 434-978-7289

OBITUARIES: obituaries.ncc@lee.net **Call:** 888-220-4265

CLASSIFIEDS: classifieds.northcarolina@lee.net **Call:** 434-978-7202

SHOP LOCAL / BUSINESS DIRECTORY: https://morganton.com/places

LEGALS

Legal Notices

BURKE COUNTY BOARD OF COMMISSIONERS NOTICE OF PUBLIC HEARINGS OCTOBER 19, 2026

The Burke County Board of Commissioners will hold a public hearing at 6:00 p.m. or as soon as public comments can be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following matters:

Development Agreement – Clover Ridge Subdivision
Parties: Burke County, City of Morganton, and Western Carolina Developers, LLC
Property: PINs 1794175470 and 1794175020
Location: City of Morganton

A public hearing will be conducted on a proposed development agreement for the Clover Ridge Subdivision

The proposed development agreement governs a phased residential development anticipated to include approximately 25 single-family lots. A copy of the proposed development agreement is available for public inspection in the office of the Clerk to the Board of Commissioners, 200 Avery Avenue, Morganton, NC, and online at www.burkenc.org.

Questions regarding the development agreement may be directed to the County Manager's Office at 828-764-9350. If a reasonable ADA accommodation is needed to participate in the public meeting, please contact the County Manager's Office by October 16, 2026, at 828-764-9350.

Publish: October 8 and October 15, 2026

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

Notice is hereby given that the Burke County Board of Commissioners will hold a public hearing at 6:00 p.m., or as soon thereafter as the matter may be heard, on October 19, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St., Morganton, NC (Door E), regarding Burke County's proposed participation in the North Carolina Commercial Property Assessed Capital Expenditure (C-PACE) Program.

The North Carolina C-PACE Program is a statewide program that allows eligible owners of qualifying commercial properties to obtain private financing for qualifying improvements, including energy efficiency, renewable energy, resiliency, and water conservation improvements. C-PACE financing is secured through a voluntary assessment and lien on the qualifying property.

The Burke County Board of Commissioners previously adopted a Resolution of Intent on September 21, 2026 declaring the County's intent to participate in the North Carolina C-PACE Program. Following the public hearing, the Board may consider adoption of a resolution authorizing Burke County to join the C-PACE Program.

Interested persons are invited to attend the public hearing and provide comments regarding Burke County's proposed participation in the C-PACE Program.

If reasonable ADA accommodations are needed to participate in the public hearing, please contact the County Manager's Office at 828-764-9350 by October 16, 2026.

Publish: October 8 and 15, 2026.

BURKE COUNTY BOARD OF COUNTY COMMISSIONERS NOTICE OF PUBLIC HEARING OCTOBER 19, 2026

The Burke County Board of Commissioners will hold two public hearings at 6:00 p.m. or as soon as public comments can be heard, on October 19th, 2026, in the Commissioners' Meeting Room, Burke Services Building, 110 N. Green St. in Morganton, NC (Door E), regarding the following zoning-related matters:

Zoning Map Amendment - ZMA 2026-04
Request: Request to rezone a parcel of land from the Residential Three (R-3) District to the General Business (G-B) District
Applicant: Bryson Carlton
Property: PIN 1791162409
Address: 2763 US 64, Morganton NC, 28655, Burke County

Zoning Map Amendment - ZMA 2026-05
Request: Request to rezone a parcel of land from the Residential Two (R-2) District to the General Business (G-B) District
Applicant: Chad Huffman
Property: PIN 2762852471
Address: 7857 Old NC 10, Hickory NC, 28602, Burke County

Questions regarding these matters may be directed to the Community Development Department at 828-764-9030. If reasonable ADA accommodations are needed to participate in the public hearings, please contact the County Manager's office by October 16th, 2026, at 828-764-9350.

Publish: October 8 and 15, 2026.



TRIPLE COMMUNITY FIRE DEPT., INC. NOTICE OF BUDGET MEETING

Triple Community Fire Department's budget meeting, scheduled for Oct. 20th at 6:30PM. The meeting will take place at the fire department, located at 505 Mountain View Drive in Morganton.
Publish: Oct. 3, Oct. 10, Oct. 17.

Advertise Your Yard Sales

1 day $29
2 days $39



(Includes online rain insurance)

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434.978.7202

LEGALS

Legal Notices

NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that on October 19th, 2026, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986, as amended (the "Code"), will be held by the Board of Commissioners of the County of Burke, North Carolina (the "County") with respect to the issuance by the Public Finance Authority (the "Authority"), a commission organized under and pursuant to Sections 66.0301, 66.0303, and 66.0304 of the Wisconsin Statutes, of its Retirement Facilities Revenue Bonds (Piedmont Affordable Senior Housing Foundation Portfolio), Series 2026, in one or more series, in an aggregate principal amount not to exceed $115,000,000 (the "Bonds"). The Authority will loan the proceeds of the Bonds to Piedmont Affordable Senior Housing Foundation Holdco I LLC, a North Carolina limited liability company (the "Borrower"), whose sole member is Piedmont Affordable Senior Housing Foundation, Inc., a North Carolina nonprofit corporation described in Section 501(c)(3) of the Code, to finance the Borrower's acquisition of a portfolio of six assisted living, memory care, and independent living communities located in North Carolina (collectively, the "Portfolio"), including the community located in the County described below, to fund a debt service reserve fund, an operating reserve fund, and a liquidity support fund for the Portfolio, and to pay costs of issuing the Bonds.

The hearing will commence at 6:00 p.m., or as soon thereafter as the matter can be heard, at the County Board Room, 110 North Green Street (Entrance E), Morganton, North Carolina 28655. Notice is being given pursuant to Treasury Regulations Section 1.147(f)-1(d)(4)(iii).

The community located in the County is The Berkeley, located at 330 Juniper Street, Morganton, North Carolina 28655 (the "Project"). The Project is owned and operated by the Borrower or by a single-member limited liability company of which the Borrower is the sole member. The maximum aggregate principal amount of the Bonds to be issued to finance the acquisition of the Project, together with the other communities comprising the Portfolio, is $115,000,000, of which not more than $25,000,000 is allocable to the financing of the acquisition of the Project. The Bonds are expected to constitute "qualified 501(c)(3) bonds" within the meaning of Section 145(a) of the Code.

The Bonds will be special, limited obligations of the Authority, payable solely from loan repayments made by the Borrower to the Authority and from certain funds and accounts established under the bond documents. The Bonds will not constitute a debt, liability, or obligation of the County, and the County assumes no financial responsibility for the Bonds by taking the action described in this notice.

The hearing will provide a reasonable opportunity to be heard for persons wishing to express their views on the merits of the issuance of the Bonds and the financing thereby of the Project. All interested parties are invited to present comments at the public hearing.

/s/ MORGAN BUCHANAN
Clerk to the Board of Commissioners
County of Burke, North Carolina

Published: October 8th and 15th , 2026

REAL ESTATE

Land Acreage

Off South Creek Rd.
in Nebo on Carswell Dr. 23.5 acres, road frontage, fields & woods. Well 23 gal min., septic tank, branch & spring. 828-442-4343 or 828-442-4505

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LEGAL NOTICES

Notice to Creditors - Shelba Jean Mull

NORTH CAROLINA, BURKE COUNTY

File No: 26E000807-110

Having qualified as Co-Executor of the Estate of Shelby Jean Mull A/K/A Shelba Jean Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

April Denise Williams, Co-Executor
P.O. Box 1825, Morganton, NC 28680
David Clyde Mull, Co-Executor
P.O. Box 1825, Morganton, NC 28680

Attorney
Daniel Law Firm, P.A.
P.O. Box 1825
Morganton, NC 28680
828-433-0700
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800474

Legals

Casey Winebarger Pope

NORTH CAROLINA, BURKE COUNTY

File No: 26E000779-110

Having qualified as Executor of the Estate of Clay June Mull, deceased, this is to notify all persons, firms and corporations having claims against the said decedent to exhibit them, duly verified, to the undersigned on or before the 1st day of January, 2027, or this notice will be pleaded in bar of their recovery. All persons, firms and corporations indebted to said estate are notified to make immediate payment.

This the 1st day of October, 2026.

Gary D. Mull, Executor
115 Searcy Street, Morganton, NC 28655

Attorney
Casey W. Pope
P.O. Box 218
Hickory, NC 28603
828-322-7741
Publication Dates: October 1, 8, 15, 22, 2026. COL-NC-800475

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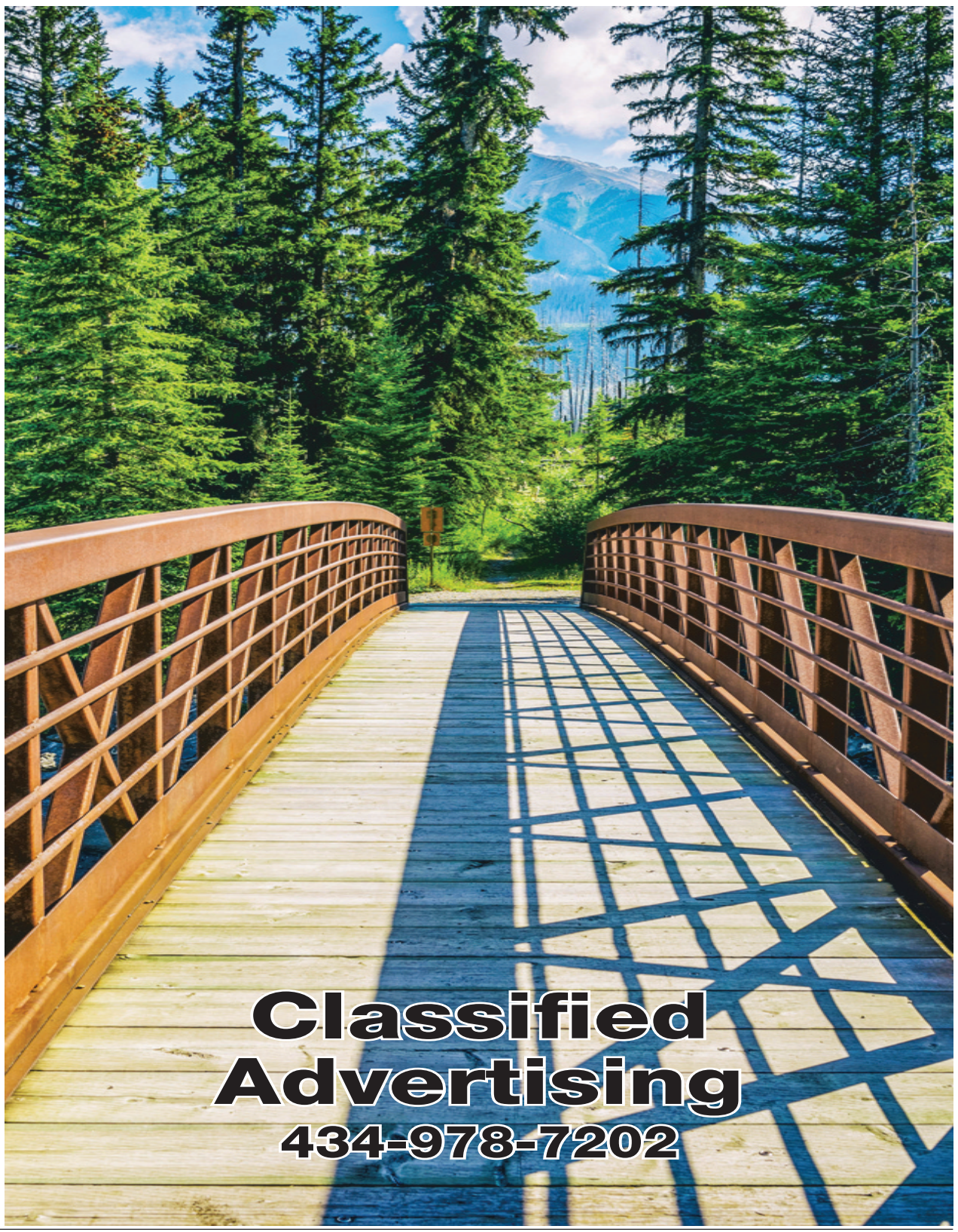

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BURKE COUNTY
PUBLIC HEARING NOTICE
CLOVER RIDGE SUBDIVISION
(PROPOSED DEVELOPMENT AGREEMENT)
OCTOBER 19, 2026 – 6:00 PM
110 N. GREEN ST, DOOR E
MORGANTON, NC
MORE INFO:
WWW.BURKENC.ORG


Oct 8, 2026
12:57 PM
Live
BURKE COUNTY
PUBLIC HEARING NOTICE
CLOVER RIDGE SUBDIVISION
(PROPOSED DEVELOPMENT AGREEMENT)
OCTOBER 19, 2026 – 6:00 PM
110 N. GREEN ST, DOOR E
MORGANTON, NC
MORE INFO:
WWW.BURKENC.ORG


Oct 8, 2026
12:57 PM
Live
BURKE COUNTY
PUBLIC HEARING NOTICE
CLOVER RIDGE SUBDIVISION
(PROPOSED DEVELOPMENT AGREEMENT)
OCTOBER 29, 2026 – 6:00 PM
110 N. GREEN ST, DOOR E
MORGANTON, NC
MORE INFO:
WWW.BURKENC.ORG

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

SCHEDULED PUBLIC HEARINGS

Subject Title: **Finance - Community Development Block Grant for Infrastructure Improvements**

Presented by: **Brian Epley, County Manager**

Summary of Information: Burke County is preparing an application to the North Carolina Department of Commerce, Division of Community Revitalization (DCR), for Community Development Block Grant–Disaster Recovery (CDBG-DR) Community Infrastructure funding for the Indian Hills Project.
The Board will conduct a public hearing to receive citizen comments regarding the proposed application and project. Following the public hearing, the Board will consider the documents and resolutions required as part of the CDBG-DR application process, including the Citizen Participation Plan, Residential Anti-Displacement and Relocation Assistance Plan, and resolution authorizing submission of the application. The proposed project is intended to benefit low- and moderate-income residents of Burke County.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To adopt Resolution No. 2026-24 approving the Burke County CDBG-DR Citizen Participation Plan and authorize the Chairman to execute the Plan. Additionally, to adopt the Residential Anti-Displacement and Relocation Assistance Plan. Further, to adopt Resolution No. 2026-25 authorizing the submission of Burke County's CDBG-DR Community Infrastructure application for the Indian Hills Project and authorizing the County Manager to execute and file the application and related documents.

or

To deny Resolution No. 2026-24 approving the Burke County CDBG-DR Citizen Participation Plan and authorize the Chairman to execute the Plan. Additionally, to adopt the Residential Anti-Displacement and Relocation Assistance Plan. Further, to adopt Resolution No. 2026-25 authorizing the submission of Burke County's CDBG-DR Community Infrastructure application for the Indian Hills Project and authorizing the County Manager to execute and file the application and related documents.

BURKE COUNTY CDBG CITIZEN PARTICIPATION PLAN

This plan describes how **Burke County** will involve citizens in the planning, implementation, and assessment of the Community Development Block Grant (CDBG) program. The funds must be used for projects which benefit low and moderate-income persons, aids in the elimination and prevention of slums and blight. The program is intended to assist governments in understanding neighborhood improvement programs. The regulations give ultimate responsibility for the design and implementation of the program to local elected officials and require that citizens be given an opportunity to serve in a key advisory role to these elected officials.

SCOPE OF CITIZEN PARTICIPATION

Citizens will be involved in all stages of the CDBG program, including program implementation, assessment of performance, and design of changes in the CDBG Citizen Participation Plan. There will be three (3) general mechanisms for their involvement:

1. To provide input during public hearings or community meetings; and
2. To provide individual citizen efforts in the form of comments, complaints, or inquiries submitted directly to the Program Administrators or designated County official; and
3. To serve as an advisory committee to potential projects impacting a particular area.

PROGRAM IMPLEMENTATION

Citizen participation in program implementation will occur primarily through consultation with the County. The County will be asked to review and comment on specific guidelines for approved projects. They will also meet to review any program amendments, budget revisions, and program modifications. All such changes will be discussed with the County and their comments considered prior to acting. If program amendments require approval from the North Carolina Department of Commerce, a public hearing shall be held, specifically on the amendment. Citizens may also be involved in implementation of projects specifically requiring citizen participation, such as self-help projects. Their roles will be defined as the project develops. Technical assistance will be available as needed.

PROGRAM ASSESSMENT

Program assessment activities by citizens will occur in a variety of ways. A performance hearing will be held twenty- five (25) to sixty (60) days prior to the start of planning for the next program year. The Program Amendment will be asked to provide citizen commentary for the Grantee Performance Report.

As a part of the orientation to the program offered at the public hearing, citizens will be invited to submit comments on all aspects of program performance through the program year. Comments should be submitted in writing to **Burke County**, 200 Avery Ave, Morganton, NC 28655. They will respond in writing within ten (10) days. If the response is unsatisfactory, the complainant should

write directly to the Chairman c/o the Clerk to the Board, 200 Avery Ave, Morganton, NC 28655. They shall respond within ten (10) days.

If the citizen is still dissatisfied, the citizen should write to the NC Department of Commerce, Division of Community Revitalization (DCR)/State CDBG Program, 4301 Mail Service Center, Raleigh, NC 27699-4346, Attention: Citizen Participation Matter. Program staff will also be available during normal business hours to respond to any citizen inquiries or complaints at (919) 707-1560.

The Citizen Participation Plan will be subject to annual review and proposed revision, to occur in the period between the performance hearing and the public hearing on the subsequent year's application.

TECHNICAL ASSISTANCE

Technical Assistance will be provided to citizen organizations and groups of low/moderate income persons or target area residents upon request to Burke County. Such assistance will support citizen efforts to develop proposals, define policy, and organize for the implementation of the program. It is expected that such assistance will be provided by **Burke County** in response to their request. Assistance could be provided in the form of local presentations, informational handouts, research of a specific issue, or other short-term efforts.

PUBLIC INFORMATION

Burke County will also undertake public information efforts to promote citizen participation. These efforts will include the following:

1. Public Notice of all Public Hearings will be published in the non-legal section of the local newspaper at least ten (10) days before the scheduled hearing. These notices will indicate the date, time, location, and topics to be considered. These notices will also be made available in the form of a press release, posted on the Burke County website and posted at publicly accessible Burke County facilities as appropriate.
2. Orientation Information will be provided at the first public hearing. The Program Administrator(s) will make a presentation which covers: (a) the total amount of CDBG funds available and the competitive basis for award; (b) the range of eligible activities; (c) the planning process and the schedule of meetings and hearings; (d) the role of citizens in the program; and (e) a summary of other program requirements, such as the environmental policies, fair housing provisions, and contracting procedures.
3. A Public File containing program documentation will be available for review at the Burke County Office, 200 Avery Ave, Morganton, NC 28655 during normal business hours. Included will be copies of the Application, Environmental Review Record, the Citizen Participation Plan, and the Annual Performance Report.
4. Public Hearings an interpreter will be provided for all non-English speaking individuals and/or hearing impaired individuals.

ADOPTED, this 19th day of October, 2026.

_____

Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

ATTEST:

_____

Morgan Buchanan
Clerk to the Board of Commissioners
Burke County

BURKE COUNTY
NORTH CAROLINA

RESOLUTION APPROVING BURKE COUNTY CDBG-DR CITIZEN PARTICIPATION PLAN

WHEREAS, Burke County is in the process of preparing applications for grants through the North Carolina Community Development Block Grant (CDBG) Disaster Recovery Program;

WHEREAS, program requirements require each applicant, and recipient shall provide citizens with an opportunity for meaningful involvement on a continuing basis and for participation in the planning, implementation and assessment of the program;

WHEREAS, further, each applicant for CDBG-DR funds shall develop and adopt, by resolution of their governing board, a written citizen participation plan developed in accordance with applicable rules; and

WHEREAS, Planning Department has drafted a citizen participation plan and requests its adoption by the Board of Commissioners.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of Burke County as follows:

1. That the Burke County CDBG-DR Citizen Participation Plan included with this agenda item is hereby adopted, and the Chairman is authorized to execute said Plan.

2. That all acts and doings of officers, employees and agents of the County, whether taken prior to, on, or after the date of this Resolution, that are in conformity with and in the furtherance of the purposes and intents of this Resolution as described above shall be, and the same hereby are, in all respects ratified, approved and confirmed.

3. That this resolution shall be effective upon its adoption.

Adopted the 19th day of October, 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

ATTEST:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

Approved as to form:

_____
County Attorney

RESIDENTIAL ANTI-DISPLACEMENT AND RELOCATION ASSISTANCE PLAN

This Residential Anti-Displacement and Relocation Assistance Plan is prepared by Burke County in accordance with the Housing and Community Development Act of 1974, as amended; and HUD regulations at 24 CFR 42.325 and is applicable to our CDBG projects.

Minimize Displacement

Consistent with the goals and objectives of activities assisted under the Act, the County will take the following steps to minimize the direct and indirect displacement of persons from their homes:

- Coordinate code enforcement with rehabilitation and housing assistance programs.
- Evaluate housing codes and rehabilitation standards in reinvestment areas to prevent undue financial burden on established owners and tenants.
- Arrange for facilities to house persons who must be relocated temporarily during rehabilitation.
- Adopt tax assessment policies, such as deferred tax payment plans, to reduce impacts of increasing property tax assessments on lower income owner-occupants or tenants in revitalizing areas.
- Work with HUD approved Housing Counseling Agency to provide homeowners and tenants with information on assistance available to help them remain in their neighborhood in the face of revitalization pressures.
- Where feasible, give priority to rehabilitation of housing, as opposed to demolition, to avoid displacement.

CDBG programs include: Entitlement Community Development Block Grant (CDBG) Program, State CDBG Program, CDBG Small Cities Program, Section 108 Loan Guarantee Program, CDBG Special Purpose Grants Program, and the Neighborhood Stabilization Program (NSP).

- If feasible, demolish or convert only dwelling units that are not occupied or vacant occupiable dwelling units (especially those units which are “low-income dwelling units” (as defined in 24 CFR 42.305).
- Target only those properties deemed essential to the need or success of the project.

A. Relocation Assistance to Displaced Persons

The County will provide relocation assistance for lower-income tenants who, in connection with an activity assisted under the CDBG Program[s], move permanently or move personal property from real property as a direct result of the demolition of any dwelling unit or the conversion of a lower-

income dwelling unity in accordance with the requirements of 24 CFR 42.350. A displaced person who is not a lower-income tenant will be provided with relocation assistance in accordance with the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, and implementing regulations at 49 CFR Part 24.

B. One-for-One Replacement and Lower-Income Dwelling Units

The County will replace all occupied and vacant occupiable lower-income dwelling units demolished or converted to a use other than lower-income housing in connection with a project assisted with funds provided under the CDBG Program[s] in accordance with 24 CFR 42.375.

Before entering into a contract committing Burke County to provide funds for a project that will directly result in demolition or conversion of lower-income dwelling units, the County will make public by publish in a local paper of general circulation and post on the information board in the Burke County Office and submit to State CDBG Programs(s) North Carolina Department of Commerce (NCDOC) the following information in writing:

1. A description of the proposed assisted project;
2. The address, number of bedrooms, and location on a map of lower-income dwelling units that will be demolished or converted to a use other than as lower-income dwelling units as a result of an assisted project;
3. A time schedule for the commencement and completion of the demolition or conversion;
4. To the extent known, the address, number of lower-income dwelling units by size (number of bedrooms) and location on a map of the replacement lower-income housing that has been or will be provided. *[See also CFR 42.375(d)].*
5. The source of funding and a time schedule for the provision of the replacement dwelling units;
6. The basis for concluding that each replacement dwelling unit will remain a lower-income dwelling unit for at least 10 years from the date of initial occupancy; and
7. Information demonstrating that any proposed replacement of lower-income dwelling units with smaller swelling units (e.g., a 2-bedroom unit with two 1-bedroom units), or any proposed replacement of efficiency or single-room occupancy (SRO) units with units of a different size, is appropriate and consistent with the housing needs and priorities identified in the HUD-approved Consolidated Plan and 24 CFR 42.375(b).

To the extent that the specific location of the replacement dwelling units and other data in items 4 through 7 are not available at the time of the general submission, the County will identify the general location of such dwelling units on a map and complete the disclosure and submission requirements as soon as the specific data is available.

C. Replacement not Required Based on Unit Availability

Under CFR 24 42.375(d), the County may submit a request to the State (NCDOC) for a determination that one-for-one replacement requirement does not apply based on objective data that there is an adequate supply of vacant lower-income dwelling units in standard condition available on a non-discriminatory basis within the areas.

D. Contacts

The Community and Economic Development Manager at WPCOG, Kyle Case (828) 485-4285, is responsible for tracking the replacement of lower income dwelling units and ensuring that they are provided within the required period.

The Accounting Technician, Angela Mitchell (828) 879-2118, is responsible for providing relocation payments and other relocation assistance to any lower-income person displaced by the demolition of any dwelling unit or the conversion of lower-income dwelling units to another use.

Adopted this 19th day of October, 2026

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

ATTEST:

_____
Morgan Buchanan
Clerk to the Board of Commissioners
Burke County

BURKE COUNTY
NORTH CAROLINA

RESOLUTION OF THE BURKE COUNTY COMMUNITY DEVELOPMENT BLOCK GRANT APPLICATION INDIAN HILLS PROJECT

WHEREAS, the Burke County Board of Commissioners has previously indicated its desire to assist in community development efforts; and,

WHEREAS, the Burke County Board of Commissioners has held two public hearings concerning the proposed application for Community Development Block Grant funding to benefit low- and moderate-income residents of the Burke County community; and,

WHEREAS, the Burke County Board of Commissioners wishes the County to pursue a formal application for Community Development Block Grant funding to benefit low-and-moderate income residents through the proposed project that will repair Indian Hills Pump Station.

WHEREAS, the Burke County Board of Commissioners certifies it will meet all federal regulatory and statutory requirements of the Community Development Block Grant Program,

NOW THEREFORE BE IT RESOLVED, BY THE BURKE COUNTY BOARD OF COMMISSIONERS:

That Brian Epley, County Manager, and successors so titled, is hereby authorized to execute and file an application on behalf of Burke County with The NC Department of Commerce Division of Community Revitalization (DCR) for approval of a Community Development Block Disaster Recovery Grant for Community Infrastructure to benefit low-and-moderate income residents through the proposed project that will Repair Indian Hills Pump Station.

That Brian Epley, County Manager, and successors so titled, is hereby authorized and directed to furnish such information as The NC Department of Commerce Division of Community Revitalization (DCR) may request in connection with such application or the project; to make the assurances as contained above; and to execute such other documents as may be required in connection with the application.

That Burke County has substantially complied or will substantially comply with all Federal, State, and local laws, rules, regulations, and ordinances applicable to the project and to the grants pertaining thereto.

Adopted the 19th day of October, 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

ATTEST:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

BURKE COUNTY
COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM
NOTICE OF SECOND PUBLIC HEARING

The Burke County Board of Commissioners is holding a second public hearing to discuss a Community Development Block Grant Disaster Recovery (CDBG-DR) $15,000,000 grant request to be submitted to the North Carolina Department of Commerce Division of Community Revitalization. This project proposes to make improvements to the Indian Hills Pump Station. 100% of the CDBG-DR funds will benefit low- and moderate-income persons.

The Public Hearing will be held at the regularly scheduled meeting on Monday, October 19th, 2026, at 6 pm in the Commissioners' Meeting Room 110, 110 N. Green Street, Entrance E, Morganton, NC 28655.

Burke County holds all public meetings in accessible rooms. All interested persons are invited to attend this hearing. Auxiliary aids will be supplied to the disabled if requested five days prior to the public hearing. Person needing special assistance or non-English speaking persons desiring to participate in this hearing should contact Morgan Buchanan, Clerk to the Board, at 828-764-9350 or 1-800-735-0533 (TDD/TTY) for the hearing impaired.

Esta información está disponible en español en en cualquier otro idioma bajo petición. Por favor, pongase encontacto con Paloma Garcia Serrano al 828-485-4281 o en Western Piedmont Council of Governments, 1880 2nd Ave NW, Hickory, NC 28801. De alojamiento para esta solicitud.

EQUAL HOUSING OPPORTUNITY

Please print above line as soon as possible but no later than October 5th, 2026.

Please provide an affidavit.

Non-legal block ad.
Fair Housing
HUD logos.

If you have any questions, please contact Kyle Case at 828.568.5618.

Thank you.

Order Confirmation

Order# 0000913944

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Account:	3153067	**Account:**	3153067
Address:	ATTN: KAY DRAUGHN MORGANTON NC 286800219	**Address:**	ATTN: KAY DRAUGHN MORGANTON NC 286800219

Sales Rep	Accnt Rep	Ordered By	Fax:	
crpboana	hkyopenterr3	Morgan	**EMail:**	kat.wright@burkenc.org

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Payment Amount	**$0.00**
Amount Due	**$194.50**
Tax Amount:	0.00
Payment Meth:	Invoice - Statement

Tear Sheets	Proofs	Affidavits	PO Number:
0	0	1	

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Run Dates 10/ 3/2026

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Run Dates 10/ 3/2026

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Order Confirmation

Order# 0000913944

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Richmond, VA 23261-7283

Ad Content Proof

Note: Ad size does not reflect actual ad

BURKE COUNTY
COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM
NOTICE OF SECOND PUBLIC HEARING

The Burke County Board of Commissioners is holding a second public hearing to discuss a Community Development Block Grant Disaster Recovery (CDBG-DR) $15,000,000 grant request to be submitted to the North Carolina Department of Commerce Division of Community Revitalization. This project proposes to make improvements to the Indian Hills Pump Station. 100% of the CDBG-DR funds will benefit low- and moderate-income persons.

The Public Hearing will be held at the regularly scheduled meeting on Monday, October 19th, 2026, at 6 pm in the Commissioners' Meeting Room 110, 110 N. Green Street, Entrance E, Morganton, NC 28655.

Burke County holds all public meetings in accessible rooms. All interested persons are invited to attend this hearing. Auxiliary aids will be supplied to the disabled if requested five days prior to the public hearing. Person needing special assistance or non-English speaking persons desiring to participate in this hearing should contact Morgan Buchanan, Clerk to the Board, at 828-764-9350 or 1-800-735-0533 (TDD/TTY) for the hearing impaired.

Esta información está disponible en español en en cualquier otro idioma bajo petición. Por favor, pongase encontacto con Paloma Garcia Serrano al 828-485-4281 o en Western Piedmont Council of Governments, 1880 2nd Ave NW, Hickory, NC 28801. De alojamiento para esta solicitud.

EQUAL HOUSING OPPORTUNITY

Publish: October 3, 2026.

BURKE COUNTY
COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM
NOTICE OF SECOND PUBLIC HEARING

The Burke County Board of Commissioners is holding a second public hearing to discuss a Community Development Block Grant Disaster Recovery (CDBG-DR) $15,000,000 grant request to be submitted to the North Carolina Department of Commerce Division of Community Revitalization. This project proposes to make improvements to the Indian Hills Pump Station. 100% of the CDBG-DR funds will benefit low- and moderate-income persons.

The Public Hearing will be held at the regularly scheduled meeting on Monday, October 19th, 2026, at 6 pm in the Commissioners' Meeting Room 110, 110 N. Green Street, Entrance E, Morganton, NC 28655.

Burke County holds all public meetings in accessible rooms. All interested persons are invited to attend this hearing. Auxiliary aids will be supplied to the disabled if requested five days prior to the public hearing. Person needing special assistance or non-English speaking persons desiring to participate in this hearing should contact Morgan Buchanan, Clerk to the Board, at 828-764-9350 or 1-800-735-0533 (TDD/TTY) for the hearing impaired.

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EQUAL HOUSING OPPORTUNITY

Publish: October 3, 2026.

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **CM - Proposed Updates to WPCOG Charter and Bylaws**

Presented by: **Brian Epley, County Manager**

Summary of Information: The Western Piedmont Council of Governments (WPCOG) is proposing amendments to its Charter and Bylaws to update and clarify the organization's governance and administrative structure. The proposed revisions include clarification of WPCOG's authority to serve as the regional public housing authority; changing certain voting thresholds from a two-thirds majority to a simple majority; eliminating the Treasurer and Secretary officer positions and adding at-large positions to the Executive Committee; recognizing a staff Clerk to the Board and Finance Officer; and other minor language clarifications.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: Motion to approve and ratify the proposed amendments to the Western Piedmont Council of Governments Charter and Bylaws as presented.

CHARTER OF THE WESTERN PIEDMONT COUNCIL OF GOVERNMENTS

I. Name

The Council shall be called Western Piedmont Council of Governments (WPCOG).

II. Powers, Duties and Functions

The Western Piedmont Council of Governments shall have the following powers:

A) To apply for, accept, receive and dispense funds and grants made available to it by the State of North Carolina or any agency thereof, the United States of America or any agency thereof, any unit of local government (whether or not a member of the Council) and any private civic agency;

B) To employ personnel;

C) To contract with consultants;

D) To contract with the State of North Carolina, any other state, the United States of America, or any agency thereof, for services;

E) To study regional governmental problems, including matters affecting health, safety, welfare, education, recreation, economic conditions, regional planning and regional development;

F) To promote cooperative arrangements and coordinated action among its member governments;

G) To make recommendations for review and action to its member governments and other public agencies which perform functions within the region in which its member governments are located;

H) For the purpose of meeting the council's office space and program needs, to acquire real property by purchase, gift, or otherwise, and to improve that property. The council may pledge real property as security for indebtedness used to finance acquisition of that property or for improvements to that real property, subject to approval by the Local Government Commission as required under North Carolina General Statute 159—153. The council may not exercise the power of eminent domain;

I) Any other powers that are exercised or capable of exercise by its member governments and desirable for dealing with problems of mutual concern to the extent such powers are specifically delegated to it from time to time by resolution of the governing board of each of its member governments which are affected thereby.

J) Any other powers authorized by applicable law and duly conferred upon or delegated to the Council in the manner required by such law.

III. Delegates

Each member government shall appoint a representative of such member government to serve as the official delegate to the Policy Board of the Western Piedmont Council of Governments. An alternate delegate shall also be appointed to serve when the official delegate is unable to attend regular and special Council meetings.

A majority of the appointed representatives must be elected officials. No member government employee shall be eligible to serve as a delegate or alternate delegate.

In addition, the Policy Board shall appoint seven (7) additional delegates to satisfy requirements of the Economic Development Administration (EDA) for board composition.

The term of office, method for filling vacancies, and method of compensation and allowances shall be as set forth in the Council Bylaws.

IV. Financial Support

The Western Piedmont Council of Governments shall receive financial support for its operations and programs as follows:

A) Regular Assessments – The member governments of the Western Piedmont Council of Governments shall fund the Council operations by means of assessments on a per capita basis as determined by the Policy Board of the Council. The per capita share of a member government shall be based on the latest North Carolina Office of State Budget estimates and shall include the population within the geographic area of the member government. Counties shall provide funds per capita after subtracting the populations of member governments within the geography of such county.

B) Special Assessments – The member governments shall fund certain Council operations and programs by means of special assessments as prescribed by law and determined by the Policy Board.

C) State and Federal Grants – The Council shall apply for and receive state and federal grants for programs approved by the Policy Board of the Council.

D) Private and Charitable Contributions – The Council shall apply for and receive and be entitled to receive funds for its operations and programs from charitable and private sources approved by the Policy Board of the Council.

V. Dissolution

A) The Western Piedmont Council of Governments shall be dissolved upon the unanimous vote of all member governments comprising the Council and the adoption of concurrent resolutions of all members of the Western Piedmont Council of Governments setting forth the dissolution and the reason therefore.

B) Any member government may withdraw from the Western Piedmont Council of Governments at the end of any fiscal year by giving at least 60 days' written notice to each of the other members. Withdrawal of a member government shall not dissolve the Council if at least two members remain.

C) Following adoption of concurrent resolutions dissolving the Western Piedmont Council of Governments or following withdrawal of all member governments from the Western Piedmont Council of Governments, the Council shall proceed to liquidate its assets and pay all liabilities within a 12-month period beginning with the date of the adoption of such resolutions or withdrawal of such members. Any assets remaining following the payment of liabilities shall be distributed in cash or in kind to the member governments in such proportions as the Policy Board of the Council may decide. Such distribution shall be made only after a unanimous vote of the members authorizing the distribution.

VI. Amendment

The Charter of the Western Piedmont Council of Governments may be amended upon the adoption of concurrent resolutions by three fourths of the existing members of the Council approving such amendment. A three-fourths majority shall be required to approve amendments to the Charter.

VII. This revised Charter shall be effective upon ratification by the required three-fourths majority of member governments.

This _____ of _____, 2026.

Amended 11/27/90
Amended 2/23/04
Amended 5/22/07
Amended 3/23/2010
Amended _____/2026

BYLAWS OF THE WESTERN PIEDMONT COUNCIL OF GOVERNMENTS

Article I. Charter

Section 1. Charter Agreement

The Western Piedmont Council of Governments is organized and exists pursuant to concurrent resolutions and amendments thereto adopted by and among the Counties of Alexander, Burke, Caldwell and Catawba; and the municipalities of Brookford, Cajah's Mountain, Catawba, Cedar Rock, Claremont, Connelly Springs, Conover, Drexel, Gamewell, Glen Alpine, Granite Falls, Hickory, Hildebran, Hudson, Lenoir, Long View, Maiden, Morganton, Newton, Rhodhiss, Rutherford College, Sawmills, Taylorsville and Valdese, in accordance with N.C. General Statute 160A-470, et. seq., as amended.

Article II. Creation

Section 1. Name of Council

The name of the regional council of governments hereby created is the "Western Piedmont Council of Governments," hereinafter referred to as the "Council." The address of the Council is 1880 2nd Avenue NW, Hickory, NC 28601.

Section 2. Legal Authority

The Council shall exist and function pursuant to N.C. General Statute 160A-470, et. seq., and other applicable laws governing regional councils of governments and public authorities.

Article III. Definition of Terms

Section 1. Terms

A. Council – the Western Piedmont Council of Governments.

B. Delegate – a representative of a member government appointed to the Policy Board by the participating member government.

C. Appointed Delegate – a minority representative or private citizen appointed to the WPCOG Policy Board by its delegates. It is the goal of the WPCOG, in compliance with the U.S. Economic Development Administration (EDA) regulations, to provide for minority representation and private citizen membership on the WPCOG Policy Board. In order to achieve this goal, seven additional delegates will be appointed by the WPCOG Policy Board who are broadly representative of the principal economic interests of the WPCOG area including the interests of the area's minority and low-income populations. These Appointed Delegates must be private citizens who are neither elected

officials nor employees of a member government. Minority representation will be obtained by working with minority groups and agencies in the area covered by the WPCOG.

D. Member Governments – those local governmental units which are charter members of the Council or approved for membership pursuant to the provisions of these Bylaws.

E. Policy Board – the governing body of the Council comprised of one representative from each member government, known as a delegate, and seven non-elected representatives.

F. Region E – Region E consists of the geographic area of Alexander, Burke, Caldwell and Catawba Counties.

G. Year – fiscal year of July 1 through June 30, unless otherwise defined.

Article IV. Membership

Section 1. Membership

The members of the Council shall be the following governmental units within Region E: Counties of Alexander, Burke, Caldwell and Catawba; and the municipalities of Brookford, Cajah's Mountain, Catawba, Cedar Rock, Claremont, Connelly Springs, Conover, Drexel, Gamewell, Glen Alpine, Granite Falls, Hickory, Hildebran, Hudson, Lenoir, Long View, Maiden, Morganton, Newton, Rhodhiss, Rutherford College, Sawmills, Taylorsville and Valdese, and such other governmental units within as may apply for and be accepted as a member government pursuant to these Bylaws.

Section 2. Application for Membership

A. Any county or municipality within Region E is eligible for membership in the Council. Upon written application, a prospective member shall be subject to the approval of a two-thirds majority of existing members. Such approval shall be given or withheld by each member government through its delegate on the Policy Board of the Council.

B. Following approval, a prospective new member shall adopt a resolution adopting the Charter and Bylaws of the Council, as amended.

C. Following approval, a new member shall appoint a delegate and an alternate delegate to represent it on the Policy Board of the Council.

Section 3. Withdrawal

Any member may withdraw from membership on the Council at the end of any fiscal year provided notice of withdrawal is made to the Policy Board of the Council by a resolution of withdrawal delivered to the Policy Board at least 60 days from the end of any fiscal year. The Council shall continue and exist so long as two or more member governments from Region E remain members of the Council.

Section 4. Dissolution

Dissolution shall take place as set forth in the Charter. Dissolution shall be incomplete until approval of dissolution and liquidation is approved by appropriate state and federal authorities.

Article V. Purpose

Section 1. Purposes

The Council is formed and serves the following purposes:

A. To promote intergovernmental coordination in communications, planning efforts, and common regional problem solving;

B. After survey and analysis, to develop and formalize policy recommendations concerning matters within the jurisdiction of local governments and having regional significance;

C. To provide an expert resource for information and in-the-field assistance in planning for a broad mix of local government services;

D. To help establish and meet regional development goals;

E. To develop and implement policy recommendations concerning local government matters having regional significance;

F. To represent the interests and needs of WPCOG member governments to state and federal agencies;

G. To be the umbrella agency for all policy and administrative coordination for area-wide multi-jurisdictional problems and agencies;

H. To retain enough flexibility in staff time and organizational structure to be able to respond to unforeseen local and regional needs;

I. To identify and respond to potential local or regional threats or opportunities;

J. To be efficient with staff time and resources available to the WPCOG.

The Council shall strive to promote harmony and cooperation among its members. It shall seek to deal with urban and rural problems in a manner which is mutually satisfactory and shall respect the autonomy of all local governments within the region.

Article VI. Powers, Duties, Functions

Section 1. Powers, Duties, Functions

The Western Piedmont Council of Governments shall have those powers set forth in N.C. General Statute 160A-475, as amended, which powers are incorporated herein by reference. In addition, the Council shall have the following powers:

A. To purchase equipment, rent office space, and enter into contracts to the extent that such activities are authorized by budgets or by specific resolutions duly adopted by all participating governmental units and are within the limits of funds appropriated to the Council by the participating governmental units for such purposes;

B. To request and receive contributions of research assistance from its own agencies, private research organizations, civic foundations, institutions of higher learning and other organizations;

C. To act as the official clearinghouse and reviewing agency of the participating governmental units for all programs (federal, state or private) requiring regional review;

D. To adopt such rules and regulations relating to the procedures to be followed by the Council as the said Council shall find to be appropriate;

E. To perform and carry out such other powers, duties and responsibilities as may be authorized by North Carolina law, except insofar as the same may conflict with the provisions of these Bylaws; provided, however, the Council shall have no power to levy any tax or to acquire any property by condemnation;

F. To act as the regional public housing authority, as originally authorized in 1977, with all the associated duties and powers pursuant to federal and state law and regulations including Chapter 157 of the N.C. General Statutes, as amended.

Article VII. Policy Board

Section 1. Governing Body

The governing body of the Council shall be known as the “Policy Board.”

Section 2. Number, Term and Composition of Policy Board

The Policy Board shall consist of one delegate from each member government. An alternate delegate from each member shall be selected to attend Policy Board meetings and otherwise act for the delegate in the event the delegate is unable to attend. Each member government shall be entitled to one vote on all matters coming before the Council requiring a vote.

A delegate and an alternate delegate shall be a representative of a member government who shall serve on the Policy Board of the Council at the pleasure of the member government. Such delegates shall serve at the pleasure of such member government until their successors are appointed. The alternate delegate shall attend Council meetings when the delegate is unable to attend.

In addition, there will be seven delegates appointed by the WPCOG Policy Board. Each of these members shall be entitled to one vote on all matters coming before the Council requiring a vote. The term of the appointment shall be for a period of two years and may be renewed at the option of the Board.

Section 3. Vacancies

In the event a delegate or alternate delegate to the Policy Board dies, retires, resigns, or otherwise ceases to serve, the member government shall fill the vacated position with a representative of such member government appointed to serve in the capacity of delegate or alternate delegate, as the case may be.

If this person is an appointed delegate, the Policy Board will appoint another person to meet non-elected or minority requirements.

Section 4. Quorum

A simple majority of the membership of the Council shall constitute a quorum for conducting business. The number required for a quorum shall not be affected by vacancies. A delegate who has withdrawn early from a meeting without being excused by a simple majority vote of the remaining delegates and appointed delegates present shall be counted as present for purposes of determining whether a quorum is present.

The affirmative vote of a simple majority of the delegates and appointed delegates present shall be necessary to act favorably on any matter unless otherwise required in these Bylaws or the Charter.

Section 5. Meetings

A. Regular – The Council shall regularly meet bimonthly on the fourth Tuesday of each month beginning in January of each calendar year at 6:00 pm at member government offices, or other locations in their jurisdictions, on a rotation basis, or such other time or place as the Policy Board may select.

Notice of each regular meeting shall be emailed to delegates, alternate delegates and appointed delegates prior to such meeting at their respective addresses or such other address as a member government may designate.

B. Special – Special meetings may be called by the Board Chair, Vice-Chair, or any five delegates of the Council upon five-day written notice, or two-day written notice if such notice is personally delivered to the delegates, alternate delegates and appointed delegates.

Written notice of special meetings shall contain a brief description of the business to be conducted at such special meeting and be consistent with the provisions of North Carolina law as it pertains to open meetings.

Section 6. Open Meetings

Meetings of the Policy Board, Executive Committee, and any other committee or public body of the Council shall comply with the North Carolina Open Meetings Law, Article 33C of Chapter 143 of the North Carolina General Statutes, to the extent applicable. The schedule of regular meetings will be maintained with the Clerk to the Board of the Council and made available from the Clerk to the Board or from the Executive Director during regular office hours at the normal place of business.

Section 7. Voting

Each member government shall be entitled to one vote on all matters that come before the Council requiring a vote. The vote may be cast by the delegate or alternate delegate of each member government.

Each appointed delegate shall also be entitled to one vote on all matters that come before the Council requiring a vote.

Section 8. Excuses from Voting

No member or appointed delegate shall be excused from voting except upon matters involving the consideration of his or her own financial interest or official conduct. In all other cases, a failure to vote by a delegate or appointed delegate who is physically present at a regular or special meeting, or who has withdrawn without being excused by a simple majority vote of the remaining delegates and appointed delegates, shall be recorded as an affirmative vote.

Section 9. Minutes to be Kept; Ayes and Noes

The Clerk to the Board shall keep full and accurate minutes of the meetings and proceedings of the Council, which shall be available for public inspection. The Clerk to the Board shall record the results of each vote in the minutes. Upon the request of any member of the Council, the ayes and noes upon any question shall be taken and recorded.

Section 10. Procedures

Procedural matters coming before the Council shall be conducted according to generally accepted rules of parliamentary procedure.

At all meetings of the Council, the order of business shall be as follows:

A. Meeting Called to Order.
B. Minutes of Previous Meeting (Correction of Minutes).
C. Unfinished Business.
D. New Business.
E. Announcements.
F. Adjournment.

Section 11. Compensation

The officers, delegates, alternate delegates and appointed delegates shall serve without compensation or remuneration for their services. This section shall not, however, prohibit reimbursement for expenses incurred while on Council business and in accordance with Council fiscal policies.

Article VIII. Organizational Structure, Procedures

Section 1. Election of Officers

At the last regular meeting of the Policy Board in a calendar year, the Council shall elect a board chair, vice-chair, immediate past chair, six at-large executive committee members, and such additional officers as the Council finds necessary in the proper performance of its duties, to serve for one year or until their successors have been duly installed. Installation of officers shall take place at the next regular meeting of the Council following their election.

Section 2. Duties of Officers

A. Board Chair – The Board Chair shall preside at all meetings of the Council at which he or she is present and shall conduct said meetings in an orderly and impartial manner so as to permit a free and full discussion by the membership of such matters as may be brought before the Policy Board.

The Board Chair shall have the same voting rights as other members. He or she shall be responsible for the implementation of the policies established and the action taken by the Council; appoint such committees as he or she finds necessary or desirable; have all the powers and duties customarily pertaining to the office of Chair of the Board; and perform such further duties as may be assigned to him or her by the Council.

B. Vice-Chair – The Vice-Chair shall perform all duties of the Chairman in the absence of the Chairman or in event of the inability of the Chairman to act, and shall perform such other duties as the Council may delegate.

All other officers elected by the Council shall perform such duties as may be prescribed by the Council.

Section 3. Reports

The Council shall prepare and submit an annual written report of its activities, including a financial statement, to the participating governmental units and the public.

Article IX. Committees

Section 1. Executive Committee

The Executive Committee shall be composed of the following elected officers: Board Chair, Vice-Chair, the Immediate Past Chair, and six At-Large Members. In the event an immediate Past Chair is not eligible to serve as a Council delegate, an additional at-large member shall be chosen to serve for a one-year term. If the Past Chair office continues to be vacant beyond the first year, the at-large position may be filled for an additional one-year term.

The Executive Committee shall meet at a minimum in the months of February, April, June, August, October and December, and such other times as called by the Chair. The time and place shall be determined by the Chair.

The Executive Committee is empowered to act for the Policy Board in matters of personnel, legal, administration, finance, and other matters as expressly authorized by the Policy Board through resolution.

Representation on the Executive Committee shall also meet the Economic Development Administration's requirements for board composition.

Should any vacancy occur after November, the Executive Committee shall recommend appointment of a member to fill the vacancy at the next regularly scheduled Policy Board meeting.

Section 2. Nominating Committee

The Board Chair shall appoint an ad hoc nominating committee of four persons from the membership to research and seek out suitable candidates for nomination to Council office. Their report is due at the regular November meeting of the Council in the calendar year for consideration and action. This report shall be received along with general nominations from the floor and shall constitute the only legitimate candidates for offices to be filled.

Section 3. Additional Committees

The Board Chair may appoint such additional committees as he or she finds necessary or desirable.

Section 4. Committee Procedures

Committees shall, in the absence of additional directives from the Board Chair and Council, follow procedures outlined in "Council Committee Policies and Procedures." Voting procedures for committees shall be as for the Council, as provided in Article VII, Sections 7-9.

Article X. Staff and Administration

Section 1. Staff

It shall be the policy of the Council to employ a staff of qualified professionals and other support staff and pay to them such compensation as it shall deem necessary and advisable to carry out their duties and implement Council projects, programs and functions.

Section 2. Appointment of Executive Director

The Executive Director shall be appointed by the Policy Board based on recommendations of the Executive Committee and shall serve at the pleasure of the Policy Board. The Executive Director shall be appointed solely on the basis of his or her executive and administrative qualifications.

Section 3. Powers and Duties of Executive Director

The Executive Director is the chief administrator of the Council. He or she is responsible to the Policy Board for the administration of all departments under the Policy Board's general control and has the following powers and duties:

A. He or she shall appoint and suspend or remove all Council employees and agents. Such appointments, suspensions and removals shall be in accordance with any general personnel rules, regulations, policies or ordinances as the Policy Board may adopt.

B. He or she shall direct and supervise the administration of all Council offices, departments, boards, committees and agencies under the general control of the Policy Board, subject to the general direction and control of the Policy Board.

C. He or she shall attend all meetings of the Policy Board and Executive Committee and recommend any measure that he considers expedient.

D. He or she shall see that the orders, resolutions and regulations of the Policy Board are faithfully executed within the Council.

E. He or she shall prepare and submit the annual budget to the Policy Board and act as budget officer.

F. He or she shall annually submit to the Policy Board and make available to the public a complete report on the finances and administrative activities of the Council as of the end of the fiscal year.

G. He or she shall appoint and supervise a finance director/officer to fulfill the requirements of N.C. General Statutes Chapter 159, the N.C. Local Government Budget and Fiscal Control Act.

H. He or she shall appoint and supervise a clerk to the board who shall keep all official minutes, books, and records and make them available for public inspection to the extent required by law. The clerk to the board shall attest to official actions of the Council and certify actions and accounts taken by that body.

I. He or she shall make any other reports that the Policy Board may require concerning the operations of Council offices, departments, committees and agencies.

J. He or she shall perform other duties that may be required or authorized by the Policy Board.

Article XI. Fiscal Control

Section 1. Policy Board to Direct Fiscal Policy of the Council

The Policy Board has and shall exercise the responsibility of developing and directing the fiscal policy of the Council under the provisions and procedures of the Local Government Budget and Fiscal Control Act as they apply to a "public authority." The Policy Board shall use a full accrual accounting system until another is adopted in accordance with Article XIII of the Bylaws entitled "Amendments."

Section 2. Annual Balanced Budget

The Council shall operate under an annual balanced budget adopted and administered in accordance with the Local Government Budget & Fiscal Control Act. The budget ordinance shall cover a fiscal year beginning July 1 and ending June 30. Only expenditures authorized in the budget may be disbursed.

Section 3. Budget Officer

The Executive Director shall serve as the Budget Officer. He or she shall have the power to sign on behalf of the Council, agreements or other instruments to be executed by the Council in the conduct of its business. Unless otherwise provided, he or she shall sign or countersign checks and vouchers in payment of obligations of the Council. In case of absence of the

Executive Director, any other Executive Committee member, or other designated official, may be empowered to countersign checks and vouchers in payment of obligations to the Council.

Section 4. Budget Requests

At the March meeting of the Council, a proposed balanced budget for the next fiscal year shall be presented. This preliminary budget as amended constitutes a first reading and shall be submitted the first week in April to each participating government for its review. At the next regular meeting of the Council in May, the Council shall conduct a public hearing and perform a second reading making any final changes necessary. The results of this meeting will constitute final action and adoption of the budget through a simple majority vote.

The budget request shall be an estimate of the financial requirements of the Council for the budget year and shall be made in such form and detail with such supporting information and justifications as the Budget Officer may prescribe. The revenue estimate shall be an estimate of all revenues to be realized by the Council during the budget year.

Section 5. Regular Assessments

The annual budget shall set forth the per capita share of the budget to be funded by each member as provided in the Charter.

Section 6. Special Assessments

If, as a result of participation in a Council program with special funding requirements, a governmental unit is required to offer separate funding for its share, this shall be made known in the budget request to that governmental unit.

Section 7. Budget Approval

Upon approval of the budget by all participating governmental units, each participant governmental unit shall appropriate its share of the budget and shall forward this amount to the Council at the beginning of each fiscal year.

Section 8. Annual Independent Audit

The Council shall have its accounts audited as soon as possible after the close of each fiscal year by a certified public accountant. The auditor shall be selected by and shall report directly to the Policy Board. Upon completion of the examination, the auditor shall prepare a written report embodying financial statements and his or her opinion and comments relating thereto.

Copies of this report shall be distributed to each Council delegate or alternate at the next regular Policy Board meeting following the publication of the report.

Article XII. Prohibited Activities

Section 1. Prohibited Activities

Notwithstanding any other provision of these articles, this organization shall not carry on any activities prohibited by the following.

A) An organization exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1954 or the corresponding provision of any future United States Internal Revenue Law, or

B) An organization contribution to which are deductible under Section 170(c)(2) of the Internal Revenue Code of 1954 or any other corresponding provision of any future United States Internal Revenue Law.

Article XIII. Amendment of Bylaws; Effective Date

Section 1. Amendment of Bylaws

Any proposed amendment, repeal, or alteration, in whole or in part, of these Bylaws shall be submitted in writing and presented for a first reading at a regular meeting of the Policy Board. This shall constitute an official first reading, after which the proposed amendment shall be transmitted to each member government for consideration and ratification. Ratification by three-fourths of the existing member governments shall be required. At the next regular meeting of the Policy Board following receipt of the required ratifications, the proposed amendment shall be presented for a second reading, at which the member governments' actions shall be reported and accepted.

Section 2. Effective Date

These revised Bylaws shall be in full force and effect from and after the date ratified by the required three-fourths majority of member governments and the Policy Board.

ADOPTED THIS _____OF _____, 2026.

Amended November 27, 1990
Amended February 23, 2004
Amended May 22, 2007
Amended _____, 2026

Western Piedmont
Council of Governments

1880 Second Avenue NW | Hickory, 28601
PO Box 9026 | Hickory, NC 28603
828.322.9191 | Fax: 828.322.5991 | www.wpcog.org

Creative Regional Solutions Since 1968

Memorandum

Date: September 23, 2026
To: WPCOG Local Government Managers, Administrators, and Clerks
From: Anthony W. Starr, Executive Director
Subject: WPCOG Charter and Bylaws Updates – ACTION NEEDED BY YOUR BOARD/COUNCIL

The Western Piedmont Council of Governments Policy Board proposes to update the WPCOG Charter and Bylaws. Last updated in 2007, the Charter and Bylaws updates serve to increase transparency and clarity for our local governments. The Executive Committee and the Policy Board unanimously approved and recommended these changes. These updates have also been reviewed by WPCOG legal counsel. The draft Charter and Bylaws are included with this communication for your review.

Summary of Changes

- Adds explicit language regarding the COG's authorization to act as the regional public housing authority (Article VI, Section 1). This was recommended to clarify authority to assist in bonds (no obligation to WPCOG or local governments) for tax advantages for developers of affordable housing projects. Original authorization for the WPCOG to act as a regional public housing authority was given in 1977.
- Changes the vote threshold for action to a simple majority instead of a two-thirds majority. (Article VII, Section 4; Article XI, Section 4). This is consistent with local government voting procedures.
- Eliminates the Treasurer position, while adding another at-large position on the Executive Committee (Article VIII, Sections 1 and 2). This is consistent with common local government structure.
- Eliminates the Secretary position while adding another at-large position on the Executive Committee and add reference to a staff Clerk to the Board (Article VIII, Section 2). This is consistent with common local government structure.
- A reference to the WPCOG finance officer was added. (Article X, Section 3). WPCOG is subject to the NC Local Government Budget and Fiscal Control Act like its municipalities and counties.
- Minor language clarifications that don't impact the intent or structure of a section.

As outlined in the Charter and Bylaws, any modification must be sent to each member government for ratification, with approval by three-fourths of the members of the WPCOG required (21 of the 28 members). Following approval by member governments, a second reading of the changes must be held at the next regular Policy Board meeting, at which time actions of the members will be reported and accepted.

The effective date of the revised Charter and Bylaws would be the second reading of the Policy Board following ratification by the required number of members. The Policy Board intends to give final approval at its November meeting. Please let us know if you have questions or require further information.

We request that our local government's governing boards approve the proposed changes and let us know by Thursday, November 12, 2026.

Executive Committee: Randy Burns, Chair | Larry Yoder, Vice Chair | Larry Chapman, Secretary | George B. Holleman, Treasurer | Joseph L. Gibbons, Past Chair | **At-Large Members:** Mike LaBrose | Cole Setzer | Jill Patton | Chris Jernigan | **Executive Director,** Anthony W. Starr

Serving: Alexander County | Taylorsville | Burke County | Connelly Springs | Drexel | Glen Alpine | Hildebran | Morganton | Rutherford College | Valdese | Caldwell County | Cajah's Mountain | Cedar Rock | Gamewell | Granite Falls | Hudson | Lenoir | Rhodhiss | Sawmills | Catawba County | Brookford | Catawba | Claremont | Conover | Hickory | Long View | Maiden | Newton

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **CM- Budget Amendment No. 8- Capital Project Closeout**

Presented by: **Brian Epley, County Manager**

Summary of Information: Budget Amendment No. 8-Capital Project Closeout. The purpose of this amendment is to close the capital project fund 220, which was used for the planning and construction of the Animal Services building and new EMS Headquarters. Fund equity will be transferred back into the capital reserve fund, of which a portion will be transferred into the capital project fund, for the purchase of cardiac monitors.

Strategic Plan Focus Area Alignment:

No. 4- Fiscal Stewardship

Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

Budgetary Effect: This Amendment transfers existing funding from the capital improvement fund into the general fund, to execute a prior planned project.

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To adopt Budget Amendment No. 8 for Capital Project Closeout as presented.

BUDGET AMENDMENT NO. 8
FY 26-27

Summary of Information: Budget Amendment #8 falls under the Public Safety focus area.

BUDGET AMENDMENT NO. 8			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	**DESCRIPTION**	**INCREASE**	**DECREASE**
REVENUES			
410-00000-05-599999	Transfer from Fund 220	$925,000	
400-00000-11-439410	Transfer from Capital Reserve Fund into Capital Project Fund	$925,000	
EXPENSES			
410-00000-55-595400	Transfer to Fund 400	$925,000	
400-44500-05-575000	Equipment	$925,000	
Purpose: to close the capital project fund 220, which was used for the planning and construction of the Animal Services building and new EMS Headquarters. Fund equity will be transferred back into the capital reserve fund, of which a portion will be transferred into the capital project fund, for the purchase of cardiac monitors.			
A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.			

Adopted this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **CM - Budget Amendment No. 9- Additional State Funding for Adult Services Clients Impacted by Hurricane Helene**

Presented by: **Brian Epley, County Manager**

Summary of Information: Budget Amendment No. 9 recognizes additional State funding being distributed to counties to assist Adult Services clients impacted by Hurricane Helene. Funding will be used based on individual assessments conducted by Adult Social Services workers to address essential needs, including medical and personal care, food and clothing, household necessities, housing assistance and repairs, and utility expenses.

Strategic Plan Focus Area Alignment:

No. 4- Fiscal Stewardship

Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

Budgetary Effect: This Amendment increases both revenue and expense of Fund 100, General Fund, by $15,800.

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To adopt Budget Amendment No. 9- Additional State Funding for Adult Services Clients Impacted by Hurricane Helene as presented.

BUDGET AMENDMENT NO. 9
FY 26-27

Summary of Information: Approval of the following Budget Amendment No. 9, recognize additional state funding that is being disbursed to counties, for the purpose of assisting adult services clients who were impacted by hurricane Helene.

BUDGET AMENDMENT NO. 9			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	**DESCRIPTION**	**INCREASE**	**DECREASE**
REVENUES			
100-52000-01-433441	Helene Disaster Funding	$15,800	
EXPENSES			
100-52000-20-561500	Adult Expenses	$15,800	

Purpose: The purpose of this amendment is to recognize additional state funding that is being disbursed to counties, for the purpose of assisting adult services clients who were impacted by hurricane Helene. Funding will be utilized for assorted essential needs, based on assessments conducted by adult social services workers.

As in the prior year, these will be used to assist individual clients as needed with medical care for physical and mental health needs not covered by Medicaid or other health insurance, assistance with personal hygiene, and support for obtaining suitable food, clothing, electronics, school supplies, and essential household and personal items. Additionally, funding may be used to locate and provide rental or mortgage assistance, housing-related repairs, modifications, and utility expenses.

A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.

Adopted this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **CM - Budget Amendment No. 10 — Sheriff Office Grants**

Presented by: **Brian Epley, County Manager**

Summary of Information: Burke County has been awarded two funding allotments from the State of North Carolina for public safety purposes. The first is a direct allotment included in the State budget for the purchase of an armored tactical vehicle. The second is funding from the North Carolina Department of Public Safety for the purchase of additional public safety radio equipment.

Strategic Plan Focus Area Alignment:
No. 3- Public Safety & Well Being

To ensure the safety of our residents through efficient and effective public safety agencies.

Budgetary Effect: This will increase both revenue and expense in Fund 215, our state allotment fund by $450,000, and will increase both revenue and expense in fund 100, general fund, by $55,000.

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To adopt Budget Amendment No. 10-Sheriff Office Grants as presented.

BUDGET AMENDMENT NO. 10
FY 26-27

Summary of Information: Approval of the following Budget Amendment No. 10, to recognize funds from multiple grant awards for the Sheriff's Office.

BUDGET AMENDMENT NO. 10			
REVENUES AND EXPENSES			
ACCOUNT NUMBER	**DESCRIPTION**	**INCREASE**	**DECREASE**
REVENUES			
215-21515-01-433100	Direct State Allotment	$450,000	
100-46503-01-433200	NC Dept of Public Safety Grant	$55,000	
EXPENSES			
215-21514-10-574005	Vehicles	$450,000	
100-44500-05-573000	Equipment	$55,000	
Purpose: The first grant is a direct allotment included in the state budget, which is for the purpose of purchasing an armored tactical vehicle. The second allotment is from the state department of public safety and will be used for the purchase of additional public safety radio equipment The funding is being awarded to Burke County by the State of North Carolina. This is a direct allotment included in the state budget, for the purpose of purchasing an armored tactical vehicle.			
A copy of these amendments shall be furnished to the Budget Officer and the Finance Officer of the County to be kept on file for direction in the disbursement of funds.			

Adopted this 19th day of October 2026.

_____
Jeffrey C. Brittain, Chairman
Burke County Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **Clerk - Appointment to LEPC Advisory Board**

Presented by: **Morgan Buchanan, Clerk to the Board**

Summary of Information: The Local Emergency Planning Committee works on planning response and general safety measures dealing with hazardous materials. This committee works hand-in-hand with emergency response agencies, businesses, industrial organizations, and the general public. The committee currently has a vacancy for Seat No. 16 — At Large. An application has been received from Brenda Campbell to serve this role.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To appoint Brenda Campbell to Seat No. 16 At-Large for the remainder of the seat term ending Jan. 31, 2029.

Outlook

Online Form Submission #30330 for Burke County Appointment Application for Boards and Committees

From noreply@civicplus.com <noreply@civicplus.com>
Date Thu 9/10/2026 6:43 AM
To Morgan Buchanan <morgan.buchanan@burkenc.org>; Kat Wright <kat.wright@burkenc.org>

CAUTION: Don't be quick to click! We're counting on you! This email is from an external sender! **Don't click** on links or open attachments from unknown sources. If you know this is spam delete the message. If you believe this message is a phish attack, Click the Phish Alert button above. If you are unsure what to do, contact the helpdesk at 9410.

Burke County Appointment Application for Boards and Committees

First Name	Brenda
Last Name	Campbell
Address	5011 Fish Hatchery Ln
City	Morganton
State	NC
Zip Code	28655
Home Phone Number	6053239981
Business Phone Number	*Field not completed.*
Cell Phone Number	6053239981
Email Address	brenda.campbell@me.com
(Section Break)	
Occupation	Retired
Retired From	FEMA
How did you hear about this opportunity?	Board / Committee Member
Are you currently serving on a county board or committee?	No
If so, please identify the board or committee.	*Field not completed.*

Please indicate any community interests and activities that you are involved in.	Local Emergency Planning Committee
Do you reside in the extraterritorial jurisdiction of a municipality, which is generally a 1 to 3-mile perimeter outside the city limits?	No

(Section Break)

List in order of preference the board and/or committee(s) on which you would like to serve.

First Choice	Local Emergency Planning Committee
Second Choice	*Field not completed.*
Third Choice	*Field not completed.*

(Section Break)

Most board or committee seats have no special requirement other than being a citizen of Burke County. Do you have special criteria that you would like to be considered for this appointment?	Former FEMA Disaster Recovery/ Red Cross Volunteer specializing in helping communities recover in natural disasters.
Describe why you are interested in serving on a board or committee. What goals and objectives do you have?	I wish to help our Community be prepared and informed on issues affecting Burke County and its citizens.
Are you willing to attend board or committee meetings on a regular basis and comply with Article IV, Section 2-92 - Attendance, of the Burke County Code of Ordinances?	Yes
Please disclose any business or personal relationships that may be considered a conflict of interest if selected to serve on a board or committee.	None

Optional Remarks	*Field not completed.*
Optional - Click here to upload supporting documentation that you wish to be reviewed alongside your application.	*Field not completed.*

Burke County is committed to providing an inclusive and welcoming environment for everyone and does not and shall not discriminate on the basis of race, color, religion or creed, gender, gender expression, age, national origin or ancestry, disability, marital status, sexual orientation, or military status, in any of its activities or operations.

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Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **Clerk - Appointment to JCPC Advisory Board**

Presented by: **Morgan Buchanan, Clerk to the Board**

Summary of Information: The purpose of the council is to assess the needs of at-risk youth in Burke County, giving particular attention to the offenders on a continuing basis. They also assist the county in planning delinquency prevention programs and recommending community-based alternatives to becoming involved in the justice system. Finally, they evaluate programs receiving community-based alternative funds or recommend new programs for Juvenile Crime Prevention Council funds to meet the continued need. An application has been received by Chazlyn Thomas to serve as Seat No. 7—Social Services Designee.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To appoint Chazlyn Thomas to Seat No. 7-Social Services Designee

Outlook

Online Form Submission #30264 for Burke County Appointment Application for Boards and Committees

From noreply@civicplus.com <noreply@civicplus.com>
Date Tue 9/8/2026 8:21 AM
To Morgan Buchanan <morgan.buchanan@burkenc.org>; Kat Wright <kat.wright@burkenc.org>

CAUTION: Don't be quick to click! We're counting on you! This email is from an external sender! **Don't click** on links or open attachments from unknown sources. If you know this is spam delete the message. If you believe this message is a phish attack, Click the Phish Alert button above. If you are unsure what to do, contact the helpdesk at 9410.

Burke County Appointment Application for Boards and Committees

First Name	Chazlyn
Last Name	Thomas
Address	3954 Newhall DR NW
City	Hickory
State	NC
Zip Code	28601
Home Phone Number	8285029989
Business Phone Number	8287649625
Cell Phone Number	8285029989
Email Address	chazlyn.thomas@burkenc.org
(Section Break)	
Occupation	Deputy Director of Burke County DSS
Retired From	*Field not completed.*
How did you hear about this opportunity?	Board / Committee Member
Are you currently serving on a county board or committee?	No
If so, please identify the board or committee.	*Field not completed.*

Please indicate any community interests and activities that you are involved in.	*Field not completed.*
Do you reside in the extraterritorial jurisdiction of a municipality, which is generally a 1 to 3-mile perimeter outside the city limits?	No

(Section Break)

List in order of preference the board and/or committee(s) on which you would like to serve.

First Choice	Juvenile Crime Prevention Council
Second Choice	*Field not completed.*
Third Choice	*Field not completed.*

(Section Break)

Most board or committee seats have no special requirement other than being a citizen of Burke County. Do you have special criteria that you would like to be considered for this appointment?	Currently employed with Burke County government as the Deputy Director of Burke County DSS.
Describe why you are interested in serving on a board or committee. What goals and objectives do you have?	In my current employment role, our paths frequently cross with the same population that JCPC serves. I would like to continue to collaborate with JCPC's mission to best serve the children and families of Burke County.
Are you willing to attend board or committee meetings on a regular basis and comply with Article IV, Section 2-92 - Attendance, of the Burke County Code of Ordinances?	Yes
Please disclose any business or personal relationships that may be considered a conflict of interest if selected to serve on a board or committee.	Currently employed with Burke County government as the Deputy Director of Burke County DSS.

Optional Remarks	*Field not completed.*
Optional - Click here to upload supporting documentation that you wish to be reviewed alongside your application.	*Field not completed.*

Burke County is committed to providing an inclusive and welcoming environment for everyone and does not and shall not discriminate on the basis of race, color, religion or creed, gender, gender expression, age, national origin or ancestry, disability, marital status, sexual orientation, or military status, in any of its activities or operations.

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Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **Tax - Tax Release and Refund Report for Period Ending September 30, 2026**

Presented by: **Travis Isaacs, Tax Administrator**

Summary of Information: Releases in value and/or refunds of taxes typically occur when:

- Taxpayers submit information that creates a reduction in value.
- Situs is corrected between counties and/or municipalities.
- Valuation appeals reduce the value of real or personal property.

The postmark reveals that a payment was submitted timely. The Board of Commissioners will be presented with the following list of releases and refunds for consideration during the regular meeting. The Net Release results from the Report Amount minus the Rebilled Amount.

Tax System Refunds and Releases			
Report Amount	**Rebilled Amount**	**Net Release**	**Refund Amount**
$65,858.28	$59,273.19	$6588.45	$0.00

VTS Refunds Over $100	
	Refund Amount
VTS Adjustments	$449.08

*Note: The net release amount results from the reported amount minus the rebilled amount.

Strategic Plan Focus Area Alignment:

No. 4- Fiscal Stewardship

Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To accept the September 2026 Tax Release and Refund Report as presented.

Payee Name	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Status	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type
CRUMP, TERRY DOUGLAS		8023 BAILEY RD	CONNELLYS SPG, NC 28612	Adjustment >= $100	0093339441	PENDING	Refund Generated due to adjustment on Bill #0093339441-2025-2025-0000-00	Over Assessment	9/30/2026	01	TAX
										26	TAX
PRICE, CURTIS BLAINE	PRICE, DANA WILLIAMS	124 EVANS ST	MORGANTON, NC 28655	Adjustment >= $100	0091898073	PENDING	Refund Generated due to adjustment on Bill #0091898073-2025-2025-0000-00	Over Assessment	9/4/2026	01	TAX
										57	TAX
										57	VEHICLE FEE

Change	Interest Change	Total Change
($219.83)	$0.00	($219.83)
($47.53)	$0.00	($47.53)
	Refund	**$267.36**
($95.60)	$0.00	($95.60)
($86.12)	$0.00	($86.12)
$0.00	$0.00	$0.00
	Refund	**$181.72**
	Total	**$449.08**

Tax Jurisdiction	District Type	Net Change
01	COUNTY	($315.43)
57	CITY	($86.12)
26	FIRE	($47.53)
Total		**($449.08)**

Report Parameters	Report Date 10/2/2026 12:25:03 PM
County	Burke
Refund Time Period	September
Refund Fiscal Year	2026 - 2027
Refund Types	Adjustment >= $100
Refund Status	AUTHORIZED,PENDING
Report Run Date	10/2/2026 12:25:03 PM

Date run: 10/2/2026 12:52:44 PM

TR-304 Bill Release Report

NCPTS V4

Data as of: 10/1/2026 7:59:41 PM

Report Parameters:

Release Date Start: **9/1/2026**

Release Date End: **9/30/2026**

Tax District: **BURKE COUNTY**

Default Sort-By: **Bill #,Taxpayer Name,Release Date,Billing Date,Operator ID, Release Amount**

Grouping: **Tax District,Release Reason**

Bill #	Taxpayer Name	Bill Date	Operator ID (Name)	Release Date	Orig Bill Amount($)	Release Amount($)	Bill Amount after Release($)
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Address Correction**						
0024103359-2026-2026-0000-00-REG	CASE, KAYLA RENEE	8/31/2026	KAYLA	9/30/2026	62.58	62.58	0.00
Subtotal						**62.58**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Adjustment**						
0000073057-2026-2026-0000-00-REG	ALDRIDGE, JERRY	7/1/2026	KAYLA	9/16/2026	6.11	6.11	0.00
0024088844-2025-2025-0000-00-REG	JOHNSON, WALTER CHRISTOPHER	8/29/2025	LOUISE	9/21/2026	179.10	179.10	0.00
0024092591-2025-2025-0000-00-REG	PRITCHARD, ASHLEY BROOKE	8/29/2025	LOUISE	9/22/2026	157.23	157.23	0.00
0024102886-2026-2026-0000-00-REG	MERRING, JOSHUA JAY	8/31/2026	LOUISE	9/21/2026	8.33	8.33	0.00
Subtotal					**350.77**	**350.77**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Amended Listing**						
0000078720-2026-2026-0000-00-REG	BRS ENTERPRISES INC	9/15/2026	AMANDA	9/15/2026	430.37	430.37	0.00
Subtotal						**430.37**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Billing Correction**						
0000011273-2026-2026-0000-00-REG	WALKER, BOBBY W	7/1/2026	AMANDA	9/16/2026	2,106.07	2,106.07	0.00
0000038190-2026-2026-0000-00-REG	CHRIST UNITED METHODIST CHURCH	7/1/2026	KENDRA MCGEE	9/24/2026	1,534.08	1,534.08	0.00
0024020906-2026-2026-0000-00-REG	NEW COVENANT LUTHERAN CHURCH	7/1/2026	KENDRA MCGEE	9/24/2026	7,667.99	7,667.99	0.00
Subtotal					**11,308.14**	**11,308.14**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Deceased**						
0000002064-2026-2026-0000-00-REG	BUSIC, JOHNNIE GIDD	7/1/2026	LOENDORF	9/4/2026	1,007.61	1,007.61	0.00
0000002064-2026-2026-0000-01-REG	BUSIC, JOHNNIE GIDD	7/1/2026	LOENDORF	9/4/2026	1,764.06	1,764.06	0.00
0000014345-2026-2025-0000-00-REG	SWAFFORD, KELLY DAWN	7/23/2026	LOENDORF	9/21/2026	525.45	525.45	0.00
0000014881-2026-2026-0001-00-REG	VINES, PEGGY NICELY	7/8/2026	LOENDORF	8/31/2026	294.92	294.92	0.00

0000019827-2026-2026-0000-00-REG	FRANKLIN, ELGIE C	7/1/2026	LOENDORF	9/11/2026	97.00	97.00	0.00
0000033167-2026-2025-0000-00-REG	DALE-WILLIAMS, TINA MORETZ	2/23/2026	LOENDORF	9/21/2026	532.75	532.75	0.00
0000048845-2026-2025-0000-00-REG	SHEPARD, ROBIN	5/11/2026	LOENDORF	9/1/2026	874.30	874.30	0.00
0000072661-2023-2023-0000-00-REG	PROPST, BETTY JEAN	7/3/2023	KAYLA	9/8/2026	104.87	104.87	0.00
0000072661-2024-2024-0000-00-REG	PROPST, BETTY JEAN	7/15/2024	KAYLA	9/8/2026	103.34	103.34	0.00
0000072661-2025-2025-0000-00-REG	PROPST, BETTY JEAN	7/1/2025	KAYLA	9/8/2026	108.73	108.73	0.00
0000072661-2026-2026-0000-00-REG	PROPST, BETTY JEAN	7/1/2026	KAYLA	9/8/2026	113.73	113.73	0.00
0000079031-2022-2022-0000-00-REG	PRITCHARD, TIMOTHY J	7/1/2022	LOENDORF	9/17/2026	80.12	80.12	0.00
0000079031-2023-2023-0000-00-REG	PRITCHARD, TIMOTHY J	7/3/2023	LOENDORF	9/17/2026	75.80	75.80	0.00
0000079031-2024-2024-0000-00-REG	PRITCHARD, TIMOTHY J	7/15/2024	LOENDORF	9/17/2026	81.96	81.96	0.00
0000079031-2025-2025-0000-00-REG	PRITCHARD, TIMOTHY J	7/1/2025	LOENDORF	9/17/2026	84.28	84.28	0.00
0000079031-2026-2026-0000-00-REG	PRITCHARD, TIMOTHY J	7/1/2026	LOENDORF	9/17/2026	84.28	84.28	0.00
0000081839-2026-2026-0000-00-REG	JONES, LLOYD JUNIOR	7/1/2026	LOENDORF	9/18/2026	15.27	15.27	0.00
0000081839-2026-2026-0000-01-REG	JONES, BRYAN JUNIOR	7/1/2026	LOENDORF	9/18/2026	15.27	1.39	13.88
0000088259-2013-2013-0000-00-REG	HUDSON, DON	7/1/2013	LOENDORF	9/16/2026	77.05	77.05	0.00
0000088259-2014-2014-0000-00-REG	HUDSON, DON	7/1/2014	LOENDORF	9/16/2026	78.69	78.69	0.00
0000088259-2015-2015-0000-00-REG	HUDSON, DON	7/1/2015	LOENDORF	9/16/2026	80.09	80.09	0.00
0000088259-2016-2016-0000-00-REG	HUDSON, DON	7/1/2016	LOENDORF	9/16/2026	83.09	83.09	0.00
Subtotal					**6,282.66**	**6,268.78**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Deferred Bill**						
0000028473-2026-2026-0070-00-DLD	MORGAN, TOMMY W	9/1/2026	KENDRA MCGEE	9/1/2026	71.48	71.48	0.00
0000047384-2026-2026-0070-00-DLD	MORGAN, TOMMY W	9/1/2026	KENDRA MCGEE	9/1/2026	71.37	71.37	0.00
0024083925-2026-2026-0070-00-DLD	MORGAN, TOMMY W	9/1/2026	KENDRA MCGEE	9/1/2026	58.52	58.52	0.00
Subtotal					**201.37**	**201.37**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Discovery Billing**						
0000088259-2017-2017-0000-00-REG	REID, REGINA	7/1/2017	LOENDORF	9/16/2026	88.49	88.49	0.00
0000088259-2018-2018-0000-00-REG	REID, REGINA	7/1/2018	LOENDORF	9/16/2026	90.49	90.49	0.00
0000088259-2018-2018-0000-01-REG	KELLYBROOK LLC	7/1/2018	LOENDORF	9/16/2026	90.49	90.49	0.00
0000088259-2019-2019-0000-00-REG	REID, REGINA	7/1/2019	LOENDORF	9/16/2026	90.65	90.65	0.00
0000088259-2019-2019-0000-01-REG	KELLYBROOK LLC	7/1/2019	LOENDORF	9/16/2026	90.65	90.65	0.00
0000088259-2020-2020-0000-00-REG	TURNER, NICOLE LYNN	7/1/2020	LOENDORF	9/16/2026	80.26	80.26	0.00
0000088259-2020-2020-0000-01-REG	KELLYBROOK LLC	7/1/2020	LOENDORF	9/16/2026	80.26	80.26	0.00
0000088259-2021-2021-0000-00-REG	TURNER, NICOLE LYNN	7/1/2021	LOENDORF	9/16/2026	84.26	84.26	0.00
0000088259-2021-2021-0000-01-REG	KELLYBROOK LLC	7/1/2021	LOENDORF	9/16/2026	84.26	84.26	0.00
0000088259-2022-2022-0000-00-REG	TURNER, NICOLE LYNN	7/1/2022	LOENDORF	9/16/2026	90.26	90.26	0.00

0000088259-2023-2023-0000-00-REG	TURNER, NICOLE LYNN	7/3/2023	LOENDORF	9/16/2026	94.16	94.16	0.00
0000088259-2024-2024-0000-00-REG	TURNER, NICOLE LYNN	7/15/2024	LOENDORF	9/16/2026	94.16	94.16	0.00
0000088259-2025-2025-0000-00-REG	TURNER, NICOLE LYNN	7/1/2025	LOENDORF	9/16/2026	98.11	98.11	0.00
0000088259-2026-2026-0000-00-REG	TURNER, NICOLE LYNN	7/1/2026	LOENDORF	9/16/2026	103.11	103.11	0.00
Subtotal					**1,259.61**	**1,259.61**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Duplicate Billing**						
0000046229-2026-2026-0000-00-REG	SMITH, GREG	7/1/2026	AMANDA	9/25/2026	320.77	320.77	0.00
0024085756-2025-2025-0000-00-REG	MAXWELL, QUANYEISHA DASHELL	8/29/2025	KAYLA	9/21/2026	219.69	219.69	0.00
0024086634-2025-2025-0000-00-REG	ANDRES TOMAS, JUAN	8/29/2025	KAYLA	9/23/2026	88.29	88.29	0.00
0024086787-2025-2025-0000-00-REG	SPARKS, MEGHAN OLIVIA STORM	8/29/2025	KAYLA	9/22/2026	133.49	133.49	0.00
0024087492-2025-2025-0000-00-REG	HAMILTON, OLIVIA GABRIELLE	8/29/2025	KAYLA	9/23/2026	120.70	120.70	0.00
0024087931-2025-2025-0000-00-REG	BERNARD, TIMOTHY GILES JR	8/29/2025	LOENDORF	9/16/2026	689.38	689.38	0.00
0024087964-2025-2025-0000-00-REG	CARSWELL, ANITA KAY	8/29/2025	KAYLA	9/21/2026	180.61	180.61	0.00
0024089345-2025-2025-0000-00-REG	LYONS, KYLEIGH GRACE	8/29/2025	LOENDORF	9/30/2026	104.34	104.34	0.00
0024089515-2025-2025-0000-00-REG	PAIGE, WADE NATHANIEL	8/29/2025	LOENDORF	9/29/2026	85.14	85.14	0.00
0024090179-2025-2025-0000-00-REG	HARRISON, ERICA SCHWARTING	8/29/2025	KAYLA	9/22/2026	176.05	176.05	0.00
0024090417-2025-2025-0000-00-REG	PITCOCK, NATHANIEL RYAN	8/29/2025	LOENDORF	9/29/2026	75.46	75.46	0.00
0024090814-2025-2025-0000-00-REG	PRICE, DAVID NEIL	8/29/2025	LOENDORF	9/23/2026	125.78	125.78	0.00
0024091151-2025-2025-0000-00-REG	VARGAS, JOEL ELIJAH	8/29/2025	KAYLA	9/28/2026	101.75	101.75	0.00
0024091201-2025-2025-0000-00-REG	HICKS, RICKY EDWARD	8/29/2025	LOENDORF	9/30/2026	53.84	53.84	0.00
0024092803-2025-2025-0000-00-REG	ANDRES TOMAS, JUAN	8/29/2025	KAYLA	9/23/2026	74.34	74.34	0.00
0024092814-2025-2025-0000-00-REG	LEE, CRYSTAL MICHELE	8/29/2025	KAYLA	9/22/2026	186.90	186.90	0.00
0024093211-2025-2025-0000-00-REG	BUSTAMANTE-VELASQUEZ, RENE	8/29/2025	LOENDORF	9/30/2026	88.66	88.66	0.00
0024101633-2026-2025-0000-00-REG	WEAVER, LARRY E	7/1/2026	KAYLA	9/22/2026	6.66	6.66	0.00
0024101633-2026-2026-0000-00-REG	WEAVER, LARRY E	7/1/2026	KAYLA	9/22/2026	6.11	6.11	0.00
0024101878-2026-2026-0000-00-REG	FOX, RALPH LEE	8/31/2026	KAYLA	9/22/2026	446.89	446.89	0.00
0024102200-2026-2026-0000-00-REG	JOHNSON, BETSY ANN	8/31/2026	LOENDORF	9/9/2026	24.18	24.18	0.00
0024102373-2026-2026-0000-00-REG	CHURCH, MATTHEW DAVID	8/31/2026	LOENDORF	9/18/2026	34.02	34.02	0.00
Subtotal					**3,343.05**	**3,343.05**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Exempt Property**						
0000001460-2026-2026-0000-00-REG	BURKE UNITED CHRISTIAN	7/1/2026	KENDRA MCGEE	9/24/2026	15,943.90	14,669.56	1,274.34
0000010793-2026-2026-0000-00-REG	CHURCH OF GOD OF VALDESE TRUST	7/1/2026	TRAVIS ISAACS	9/21/2026	617.61	617.61	0.00
0000023165-2026-2026-0000-00-REG	BRYANT, TAMMY JEAN	7/1/2026	LOENDORF	9/23/2026	929.09	929.09	0.00
0000023165-2026-2026-0000-01-REG	BRYANT, TAMMY JEAN	7/1/2026	LOENDORF	9/23/2026	513.04	513.04	0.00
0000026421-2026-2026-0000-00-REG	HOYLE, CYNTHIA O	7/1/2026	LOENDORF	9/23/2026	1,155.14	1,155.14	0.00

0000026421-2026-2026-0000-01-REG	HOYLE, CYNTHIA O	7/1/2026	LOENDORF	9/23/2026	626.35	626.35	0.00
0000026959-2026-2026-0000-00-REG	HUDSON, JAMES E	7/1/2026	LOENDORF	9/23/2026	588.13	588.13	0.00
0000026959-2026-2026-0000-01-REG	HUDSON, JAMES E	7/1/2026	LOENDORF	9/23/2026	357.83	357.83	0.00
0000045638-2026-2026-0000-00-REG	BARNES, CHARLES	7/1/2026	LOENDORF	9/23/2026	3,059.04	3,059.04	0.00
Subtotal					**23,790.13**	**22,515.79**	**$1,274.34**
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Less than min amt**						
0000054662-2026-2026-0001-00-REG	LESTER, JASON LEE	9/29/2026	LOENDORF	9/29/2026	3.06	3.06	0.00
0024075660-2026-2026-0001-00-REG	POTEET, JEFFREY WAYNE	9/3/2026	LOENDORF	9/3/2026	1.84	1.84	0.00
0024075721-2026-2026-0001-00-REG	ANDERSON, TODD STACEY	9/10/2026	KAYLA	9/10/2026	1.84	1.84	0.00
0024083925-2026-2026-0000-01-REG	MORGAN, TOMMY W	7/1/2026	KENDRA MCGEE	9/1/2026	0.64	0.64	0.00
0024095618-2026-2026-0001-00-REG	DUCKWORTH, JANIE P	9/1/2026	KAYLA	9/1/2026	1.84	1.84	0.00
0024096239-2026-2026-0001-00-REG	CLARK, DAVID BRYAN	9/30/2026	LOENDORF	9/30/2026	1.84	1.84	0.00
0024096293-2026-2026-0001-00-REG	SCOTT, JOSEPH A	9/29/2026	LOENDORF	9/29/2026	1.84	1.84	0.00
0024098096-2026-2026-0001-00-REG	MYERS, ROBERT HERMAN	9/29/2026	LOENDORF	9/29/2026	1.84	1.84	0.00
0024098333-2026-2026-0001-00-REG	DUNCAN, MICHAEL VERNON	9/29/2026	LOENDORF	9/29/2026	1.84	1.84	0.00
0024103895-2026-2026-0000-00-REG	NETHERTON, GREGORY LEE	9/23/2026	LOENDORF	9/23/2026	3.06	3.06	0.00
0024103907-2026-2026-0000-00-REG	LYNN, JIMMY	9/28/2026	LOENDORF	9/28/2026	1.84	1.84	0.00
0024103919-2026-2026-0000-00-REG	MAHAFFEY, ROBERT HOWELL III	9/29/2026	LOENDORF	9/29/2026	3.06	3.06	0.00
0024103929-2026-2026-0000-00-REG	GILLIS, CLINTON MICHAEL	9/30/2026	KAYLA	9/30/2026	3.06	3.06	0.00
0024103930-2026-2026-0000-00-REG	OLLIS, CHARLES D	9/30/2026	KAYLA	9/30/2026	3.06	3.06	0.00
Subtotal					**30.66**	**30.66**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Mapping Correction**						
0000025293-2025-2025-0000-00-REG	POLLARD, SAMUEL LIGE	7/1/2025	KENDRA MCGEE	9/23/2026	1,190.02	1,190.02	0.00
0000025293-2026-2026-0000-00-REG	POLLARD, SAMUEL LIGE	7/1/2026	KENDRA MCGEE	9/23/2026	1,995.25	1,995.25	0.00
0024103597-2026-2026-0000-00-REG	SMITH, MICHAEL DEAN	8/31/2026	LOENDORF	9/22/2026	35.32	35.32	0.00
Subtotal					**3,220.59**	**3,220.59**	
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Not in Burke County**						
0000073748-2026-2026-0000-00-REG	ANDERSON, RAY NELSON II	7/1/2026	KAYLA	9/8/2026	22.65	6.11	16.54
0000073748-2026-2026-0000-00-REG	ANDERSON, RAY NELSON II	7/1/2026	KAYLA	9/8/2026	16.54	16.54	0.00
0000080788-2026-2026-0000-00-REG	FLOYD, KIMBERLY MULLINS	7/1/2026	KAYLA	9/25/2026	117.76	117.76	0.00
0024102057-2026-2026-0000-00-REG	WOOLEVER, CARLTON EUGENE	8/31/2026	KAYLA	9/24/2026	495.50	495.50	0.00
Subtotal					**652.45**	**635.91**	**$16.54**
TAX DISTRICT: BURKE COUNTY	**RELEASE REASON: Over Assessment**						
0000093052-2026-2026-0000-00-REG	IPOCK, GORDON G SR	7/1/2026	LOENDORF	9/28/2026	66.85	54.95	11.90
Subtotal						**54.95**	**$11.90**

TAX DISTRICT: BURKE COUNTY **RELEASE REASON: Ownership Correction**

0000042486-2026-2026-0000-00-REG	WHISNANT, BRENDA W	7/1/2026	KAYLA	9/2/2026	102.55	102.55	0.00
0000043643-2024-2024-0000-01-REG	BURRIS CRAIG, MARY ELAINE	7/15/2024	KAYLA	9/15/2026	111.59	111.59	0.00
0000043643-2025-2025-0000-01-REG	BURRIS CRAIG, MARY ELAINE	7/1/2025	KAYLA	9/15/2026	119.35	119.35	0.00
0000043643-2026-2026-0000-00-REG	CRAIG, EARL ALLEN	7/1/2026	KAYLA	9/15/2026	124.35	124.35	0.00
0000079923-2026-2026-0000-00-REG	GILLESPIE, WILLIE E	7/1/2026	KAYLA	9/25/2026	119.59	119.59	0.00
0024008068-2026-2026-0000-00-REG	OCONNER PROPERTIES LLC	7/1/2026	LOUISE	9/2/2026	1,166.76	1,166.76	0.00
0024008347-2026-2026-0000-00-REG	BOYLES, AVERY	7/1/2026	LOUISE	9/23/2026	569.18	569.18	0.00
0024008354-2026-2026-0000-00-REG	RWH FAMILY INVESTMENTS LLC	7/1/2026	LOUISE	9/2/2026	960.14	960.14	0.00
0024009558-2026-2026-0000-00-REG	ORANGE MORGANTON HOME SALES	7/1/2026	LOUISE	9/23/2026	800.36	800.36	0.00
0024009696-2026-2026-0000-00-REG	INTEGRITY MCALPINE ADULT CARE	7/1/2026	LOUISE	9/23/2026	807.56	807.56	0.00
0024009983-2024-2024-0000-00-REG	LIGHTHOUSE COMMUNITIES 3 LLC	7/15/2024	LOUISE	9/23/2026	393.58	393.58	0.00
0024009983-2025-2025-0000-00-REG	LIGHTHOUSE COMMUNITIES 3 LLC	7/1/2025	LOUISE	9/23/2026	409.21	409.21	0.00
0024009983-2026-2026-0000-00-REG	LIGHTHOUSE COMMUNITIES 3 LLC	7/1/2026	LOUISE	9/23/2026	429.21	429.21	0.00
0024034069-2021-2021-0000-00-REG	CRAFTON, THOMAS ROBERT	7/1/2021	LOENDORF	9/18/2026	82.51	82.51	0.00
0024034069-2022-2022-0000-00-REG	CRAFTON, THOMAS ROBERT	7/1/2022	LOENDORF	9/18/2026	89.16	89.16	0.00
0024034069-2023-2023-0000-00-REG	CRAFTON, THOMAS ROBERT	7/3/2023	LOENDORF	9/18/2026	94.16	94.16	0.00
0024034069-2024-2024-0000-00-REG	CRAFTON, THOMAS ROBERT	7/15/2024	LOENDORF	9/18/2026	94.16	94.16	0.00
0024034069-2025-2025-0000-00-REG	CRAFTON, THOMAS ROBERT	7/1/2025	LOENDORF	9/18/2026	98.11	98.11	0.00
0024034069-2026-2026-0000-00-REG	CRAFTON, THOMAS ROBERT	7/1/2026	LOENDORF	9/18/2026	103.11	103.11	0.00
0024073412-2023-2023-0000-00-REG	BUX, STEVE	7/3/2023	KAYLA	9/15/2026	94.16	94.16	0.00
0024073412-2024-2024-0000-00-REG	BUX, STEVE	7/15/2024	KAYLA	9/15/2026	94.16	94.16	0.00
0024073412-2025-2025-0000-00-REG	BUX, STEVE	7/1/2025	KAYLA	9/15/2026	6.11	6.11	0.00
0024073412-2026-2026-0000-00-REG	BUX, STEVE	7/1/2026	KAYLA	9/15/2026	6.11	6.11	0.00
0024077318-2026-2026-0000-00-REG	TAYLOR, BETTY JEAN W	7/1/2026	LOENDORF	9/2/2026	21.37	21.37	0.00
0024096034-2026-2026-0000-00-REG	BRACKETT, MARK J	7/1/2026	LOENDORF	9/2/2026	12.21	12.21	0.00
Subtotal					**6,908.76**	**6,908.76**	

TAX DISTRICT: BURKE COUNTY **RELEASE REASON: Process Correction**

0024085269-2026-2026-0000-00-REG	BOYD, JAMES C	7/1/2026	LOENDORF	9/17/2026	25.28	25.28	0.00
0024093998-2026-2026-0001-00-REG	MCBRIDE, CHRISTOPHER JACK	9/29/2026	LOENDORF	9/30/2026	4.28	4.28	0.00
Subtotal					**29.56**	**29.56**	

TAX DISTRICT: BURKE COUNTY **RELEASE REASON: Release LFUF**

0024073412-2023-2023-0000-01-REG	BUXKEMPER, SHARON H	7/3/2023	KAYLA	9/24/2026	94.16	88.00	6.16
0024073412-2024-2024-0000-01-REG	BUXKEMPER, SHARON H	7/15/2024	KAYLA	9/24/2026	94.16	88.00	6.16
Subtotal					**188.32**	**176.00**	

TAX DISTRICT: BURKE COUNTY **RELEASE REASON: Sold/Traded**

0000075702-2026-2026-0000-00-REG	NORMAN, DONALD E	7/1/2026	KAYLA	9/14/2026	1,521.42	121.55	1,399.87
0024026107-2022-2022-0000-00-REG	COX, ROBERT C	7/1/2022	KAYLA	9/28/2026	11.43	11.43	0.00
0024026107-2023-2023-0000-00-REG	COX, ROBERT C	7/3/2023	KAYLA	9/28/2026	9.21	9.21	0.00
0024026107-2024-2024-0000-00-REG	COX, ROBERT C	7/15/2024	KAYLA	9/28/2026	8.75	8.75	0.00
0024026107-2025-2025-0000-00-REG	COX, ROBERT C	7/1/2025	KAYLA	9/28/2026	8.67	8.67	0.00
0024026107-2026-2026-0000-00-REG	COX, ROBERT C	7/1/2026	KAYLA	9/28/2026	8.67	8.67	0.00
0024083090-2025-2025-0000-00-REG	HENSLEY, ANTHONY SCOTT	7/1/2025	KAYLA	9/14/2026	183.15	183.15	0.00
0024083090-2026-2026-0000-00-REG	HENSLEY, ANTHONY SCOTT	7/1/2026	KAYLA	9/14/2026	183.15	183.15	0.00
Subtotal					**1,934.45**	**534.58**	**$1,399.87**

TAX DISTRICT: BURKE COUNTY **RELEASE REASON: Value Change**

0000000072-2026-2026-0000-00-REG	BALL, NATHAN L	7/1/2026	KENDRA MCGEE	9/3/2026	395.08	207.21	187.87
0000028473-2026-2026-0000-00-REG	MORGAN, TOMMY W	7/1/2026	KENDRA MCGEE	9/1/2026	107.81	107.81	0.00
0000029547-2026-2026-0000-00-REG	MOORE, ARNOLD DANIEL IV	7/1/2026	KENDRA MCGEE	9/4/2026	1,259.65	557.38	702.27
0000043643-2026-2026-0000-01-REG	CRAIG, MARY B	7/1/2026	KAYLA	9/15/2026	124.35	3.96	120.39
0000047384-2026-2026-0000-00-REG	MORGAN, TOMMY W	7/1/2026	KENDRA MCGEE	9/1/2026	478.21	478.21	0.00
0024049407-2026-2025-0000-00-REG	UTILIPLEX LLC	9/18/2026	LOUISE	9/18/2026	1,665.00	250.87	1,414.13
0024049407-2026-2026-0000-00-REG	UTILIPLEX LLC	9/18/2026	LOUISE	9/18/2026	1,665.00	250.87	1,414.13
0024060206-2026-2026-0000-00-REG	COFFEY, DONNIE L	7/1/2026	LOUISE	9/21/2026	73.26	26.25	47.01
0024083925-2026-2026-0000-00-REG	MORGAN, TOMMY W	7/1/2026	KENDRA MCGEE	9/1/2026	59.16	59.16	0.00
Subtotal					**5,827.52**	**1,941.72**	**3,885.80**
Total						**59,273.19**	**$6,588.45**

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

CONSENT AGENDA

Subject Title: **Tax - Tax Collection Report for Period Ending September 30, 2026**

Presented by: **Travis Isaacs, Tax Administrator**

Summary of Information: The Board of Commissioners will be presented with the Tax Collection Report for the period between July 1, 2026, and September 30, 2026. This reflects the status of collections by the Burke County Tax Collection's Staff and serves as a supplement to the Annual Settlement Report. The Tax Levy is the total property tax value, not including motor vehicles, times the tax rate. This amount changes monthly with the addition of discoveries, other changes, or corrections, and when Public Utility Values are added, typically during September.

Year-to-Date Revenue Collections				
	Budget	**Actuals to Date**	**% Collected**	**$ Remaining**
Current Year Taxes	$65,587,042	$35,762,557	54%	$26,824,484
Discounts	($350,000)	($344,0080		
Delinquent Taxes	$700,000	$373,974	53%	$326,026
Interest and Fees	$329,000	$50,000	15%	$278,764
Total	$61,174,871	$36,186,747		

Total Levy For 2026-2027 Tax Year

	Current Year Amended Levy	**Current Year Collected**	**% Collected**	**$ Remaining**
Property Taxes	$57,319,903	$35,570,306	62%	$23,037,355
Motor Vehicle Taxes	$5,456,857	$1,775,053	32%	$3,681,804

Fire Tax	$80,078,008	$5,009,774	63%	$3,032,319

Strategic Plan Focus Area Alignment:

No. 4- Fiscal Stewardship

Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To accept the September 2026 Tax Collection Report as presented.

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

ITEMS FOR DECISION

Subject Title: **FM - Approval of Burke County for the Issuance of Tax-Exempt Debt Obligations by Oak Hill Fire and Rescue Protection Association, Inc**

Presented by: **Jimmy Winters**

Summary of Information: Oak Hill Fire and Rescue Protection Association, Inc. is proposing tax-exempt financing in an amount not to exceed $1,100,000 for the purchase of one pumper fire truck and one pumper/tanker fire truck. The equipment will be owned and operated by Oak Hill Fire and Rescue and used exclusively to provide fire protection services within the Oak Hill Fire District. The financing does not provide Burke County with ownership or financial obligation of the equipment; the equipment will remain owned and operated by Oak Hill Fire and Rescue.

Strategic Plan Focus Area Alignment:

No. 3- Public Safety & Well Being

To ensure the safety of our residents through efficient and effective public safety agencies.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To support Oak Hill Fire and Rescue Association Inc.'s efforts to purchase (1) Pumper Fire Truck and (1) Pumper/Tanker Fire Truck and authorize the Chairman to execute the Certificate of Approval for financing through Home Trust Bank.

SCHEDULE 1 TO
CERTIFICATE OF APPROVAL
AND EVIDENCE OF NOTICE OF THE PUBLIC HEARING

Evidence of Website Posting of Notice of Public Hearing
or
Affidavit of Publication of Notice of Public Hearing

FORM OF NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that Oak Hill Fire and Rescue Protection Association, Inc. a nonprofit corporation and volunteer fire department (the "Fire Department"), will hold a public hearing at the request of and on behalf of the Burke County (the "Local Government"), as required pursuant to Section 147(f) of the Internal Revenue Code of 1986 (the "Code"). The public hearing will be held on October 6th, 2026, at 0700 P.M., regarding the proposed plan of finance by the Fire Department to purchase (1) Pumper Fire Truck and (1) Pumper/Tanker Fire Truck (collectively, the "Equipment"), which will be owned and operated by the Fire Department exclusively for the benefit of the (the "District") pursuant to an arrangement between the Fire Department and the Local Government. The Equipment will be located at the following address: 2400 NC Hwy 181 Morganton NC 28655, within the jurisdictional boundaries of the Local Government and the District. As part of the proposed plan of finance for the Equipment, the Fire Department expects to enter into a tax-exempt debt Obligations (the "Lease") and use proceeds of the Lease to purchase the Equipment. The maximum principal amount of the Lease will not exceed $1,100,000.00.

At the public hearing, members of the public may appear in person to make or give oral or written comments in favor of or in opposition to the plan of finance for the Equipment and the Lease and/or the location and nature of the Equipment.

Following the public hearing, approval of the plan of finance for the Equipment and the Lease by the Local Government is necessary for the interest portion of rental payments under the Lease to be excludable from gross income for federal income tax purposes and in satisfaction of the requirements of Section 147(f) of the Code.

By order of the governing body of Burke County.

DATED: September 23, 2026.

TO BE PLACED ON COUNTY LETTERHEAD

Date:

HomeTrust Bank
PO Box 10
Asheville, NC 28802-0010

Gentlemen:
The funding for Oak Hill Fire and Rescue Protection Association, Inc. has been progressive as per the following schedule:

FISCAL YEAR	ACTUAL OR ANTICIPATED TAX REVENUE	ASSESSED VALUATION	RATE PER $100 VALUE
2027	$	$	$
2026	$	$	$
2025	$	$	$

SIGNATURE BLOCK OF APPROPRIATE COUNTY OFFICER: _____

SCHEDULE H TO
MUNICIPAL LEASE AND OPTION AGREEMENT
Oak Hill Fire and Rescue Protection Association, Inc.

CERTIFICATE OF APPROVAL
AND EVIDENCE OF NOTICE OF THE PUBLIC HEARING

APPROVAL OF Burke County FOR THE ISSUANCE OF TAX-EXEMPT DEBT OBLIGATIONS BY Oak Hill Fire and Rescue Protection Association, Inc.

WHEREAS, Oak Hill Fire and Rescue Protection Association, Inc. a nonprofit corporation and volunteer fire department, organized under the laws of the State of North Carolina, (the "Fire Department") intends to issue (2) tax-exempt debt Obligations (the "Obligations") to provide for the financing of (collectively, the "Equipment"); and

WHEREAS, pursuant to an agreement between the Burke County, a municipal corporation of the State of North Carolina (the "District") such District not otherwise provided with any other firefighting or fire rescue services; and

WHEREAS, pursuant to Section 147(f) of the Internal Revenue Code of 1986 (the "Code"), approval of the issuance of the Obligations is required to be given by the applicable elected representative of the governmental unit on behalf of which the Obligations is to be issued and the governmental unit where the Equipment will be located, after a public hearing is held following reasonable public notice thereof; and

WHEREAS, pursuant to Section 147(f)(4)(B) of the Code, Section 1.147(f)-1(b)(5) of the U.S. Treasury Regulations (the "Regulations"), and Section 150(e)(2)(B) of the Code, the Local Government is treated as the governmental unit on behalf of which the Obligations is to be issued, and is also the governmental unit where the Equipment is located; and

WHEREAS, the notice of public hearing, as shown on **Schedule 1** attached hereto, advised the public that a public hearing would be held on the date set forth in such notice, to discuss the proposed issuance of the Obligations by the Fire Department on behalf of the Local Government, and that interested parties would be afforded an opportunity to express their views at that public hearing; and

WHEREAS, the undersigned is the applicable elected official of the Local Government, within the meaning of Section 147(f) of the Code and Section 1.147(f)-1(e) of the Regulations, authorized to approve the issuance of the Obligations for the Equipment in a principal amount not to exceed $1,100,000.00; and

NOW, THEREFORE, a public hearing on the proposed financing having been duly called and held by the Fire Department, on behalf of the Local Government, and all those in favor of the plan of finance, including, the issuance of the Obligations to pay all or a portion of the costs of the Equipment and those opposed to the plan of finance, including, the issuance of the Obligations having had an opportunity to be heard at such public hearing, a report of such public hearing having been duly made, appropriate findings and any appropriate certification or determination of the Equipment need having been provided, the plan of finance and issuance of the Obligations to finance the Equipment is hereby approved.

Pursuant to applicable state law, the Fire Department will issue the Obligations on behalf of the Local Government and use the proceeds thereof to finance all or a part of the Equipment as herein described. The Equipment will be owned and operated by the Fire Department to provide firefighting and fire rescue services exclusively for the benefit of the Local Government and within the jurisdictional boundaries of the Oak Hill Fire District and located at the following address: 2400 NC Hwy 181 Morganton NC 28655. The purpose of the purchase of the Equipment by the Fire Department with proceeds of the Obligations is Fire Protection for the Community.

Dated:

By: _____

Name: _____
Chairman
Burke County Commission

BURKE COUNTY

Jeff Brittain, Chair
Phil Smith, Vice Chair
Brian Barrier, Commissioner
Randy Burns, Commissioner
Mike Stroud, Commissioner

ALL ABOUT ADVANCING

Brian C. Epley, Co. Manager
Morgan Buchanan, Clerk to the Board
Destin Hall, County Attorney
Kania Law Firm, P.A., Tax Attorney
www.burkenc.org

Home Trust Bank

PO Box 10

Asheville, NC 28802-0010

October 12, 2026

To whom it may concern,

The funding for Oak Hill Fire and Rescue, Inc. has been progressive as per the following schedule:

FISCAL YEAR	ACTUAL/ANTICIPATED TAX REVENUE	ASSESSED VALUATION	RATE PER $100 VALUE
2027*	$487,750	$609,687,500	$0.08
2026	$478,187	$590,733,750	$0.08
2025	$466,102	$582,627,500	$0.08

*2027 is a revaluation year, revenue could be higher.

Sincerely,

Chandler Bumgarner

Interim Chief Financial Officer

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

ITEMS FOR DECISION

Subject Title: **FM - Approval of Burke County for the Issuance of Tax-Exempt Debt Obligations by Lake James Fire and Rescue, Inc.**

Presented by: **Ken Corn**

Summary of Information: Lake James Fire and Rescue, Inc. is proposing tax-exempt financing in an amount not to exceed $483,265 for the purchase of one new Quick Attack Fire Truck. The equipment will be owned and operated by Lake James Fire and Rescue and used exclusively to provide fire protection and rescue services within the Lake James Fire District. The financing does not provide Burke County with ownership or financial obligation of the equipment; the equipment will remain owned and operated by Lake James Fire and Rescue.

Strategic Plan Focus Area Alignment:

No. 3- Public Safety & Well Being

To ensure the safety of our residents through efficient and effective public safety agencies.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: Motion to approve the issuance of tax-exempt debt obligations by Lake James Fire and Rescue, Inc., in an amount not to exceed $483,265 for the purchase of one new Quick Attack Fire Truck, and authorize the Chairman to execute the Certificate of Approval for financing through Home Trust Bank.

SCHEDULE H TO
MUNICIPAL LEASE AND OPTION AGREEMENT
Lake James Fire and Rescue, Inc.

CERTIFICATE OF APPROVAL
AND EVIDENCE OF NOTICE OF THE PUBLIC HEARING

APPROVAL OF Burke County FOR THE ISSUANCE OF TAX-EXEMPT DEBT OBLIGATIONS BY Lake James Fire and Rescue, Inc.

WHEREAS, Lake James Fire and Rescue, Inc., a nonprofit corporation and volunteer fire department, organized under the laws of the State of North Carolina, (the "Fire Department") intends to issue a tax-exempt debt obligation (the "Obligation") to provide for the financing of a Quick Attack Fire Truck (collectively, the "Equipment"); and

WHEREAS, pursuant to an agreement between the Burke County, a municipal corporation of the State of North Carolina (the "District") such District not otherwise provided with any other firefighting or fire rescue services; and

WHEREAS, pursuant to Section 147(f) of the Internal Revenue Code of 1986 (the "Code"), approval of the issuance of the Obligation is required to be given by the applicable elected representative of the governmental unit on behalf of which the Obligation is to be issued and the governmental unit where the Equipment will be located, after a public hearing is held following reasonable public notice thereof; and

WHEREAS, pursuant to Section 147(f)(4)(B) of the Code, Section 1.147(f)-1(b)(5) of the U.S. Treasury Regulations (the "Regulations"), and Section 150(e)(2)(B) of the Code, the Local Government is treated as the governmental unit on behalf of which the Obligation is to be issued, and is also the governmental unit where the Equipment is located; and

WHEREAS, the notice of public hearing, as shown on **Schedule 1** attached hereto, advised the public that a public hearing would be held on the date set forth in such notice, to discuss the proposed issuance of the Obligation by the Fire Department on behalf of the Local Government, and that interested parties would be afforded an opportunity to express their views at that public hearing; and

WHEREAS, the undersigned is the applicable elected official of the Local Government, within the meaning of Section 147(f) of the Code and Section 1.147(f)-1(e) of the Regulations, authorized to approve the issuance of the Obligation for the Equipment in a principal amount not to exceed $483,265.00; and

NOW, THEREFORE, a public hearing on the proposed financing having been duly called and held by the Fire Department, on behalf of the Local Government, and all those in favor of the plan of finance, including, the issuance of the Obligation to pay all or a portion of the costs of the Equipment and those opposed to the plan of finance, including, the issuance of the Obligation having had an opportunity to be heard at such public hearing, a report of such public hearing having been duly made, appropriate findings and any appropriate certification or determination of the Equipment need having been provided, the plan of finance and issuance of the Obligation to finance the Equipment is hereby approved.

Pursuant to applicable state law, the Fire Department will issue the Obligation on behalf of the Local Government and use the proceeds thereof to finance all or a part of the Equipment as herein described. The Equipment will be owned and operated by the Fire Department to provide firefighting and fire rescue services exclusively for the benefit of the Local Government and within the jurisdictional boundaries of the District and located at the following address: 3222 NC Hwy 126 Morganton NC 28655. The purpose of the purchase of the Equipment by the Fire Department with proceeds of the Obligation is Fire Protection for the Community.

Dated: 8/19/2026

By: _____

Name: _____
Chairman
Burke County Commission

SCHEDULE 1 TO
CERTIFICATE OF APPROVAL
AND EVIDENCE OF NOTICE OF THE PUBLIC HEARING

Evidence of Website Posting of Notice of Public Hearing
or
Affidavit of Publication of Notice of Public Hearing

FORM OF NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN that Lake James Fire and Rescue, Inc. nonprofit corporation and volunteer fire department (the "Fire Department"), will hold a public hearing at the request of and on behalf of the Burke County (the "Local Government"), as required pursuant to Section 147(f) of the Internal Revenue Code of 1986 (the "Code"). The public hearing will be held on _____, 20__, at _____ _.M., regarding the proposed plan of finance by the Fire Department to purchase (1) new Quick Attack Fire Truck, (collectively, the "Equipment") which will be owned and operated by the Fire Department exclusively for the benefit of the (the "District") pursuant to an arrangement between the Fire Department and the Local Government. The Equipment will be located at the following address: 3222 NC Hwy 126 Morganton NC 28655, within the jurisdictional boundaries of the Local Government and the District. As part of the proposed plan of finance for the Equipment, the Fire Department expects to enter into a tax-exempt debt obligation (the "Lease") and use proceeds of the Lease to purchase the Equipment. The maximum principal amount of the Lease will not exceed $483,265.00.

At the public hearing, members of the public may appear in person to make or give oral or written comments in favor of or in opposition to the plan of finance for the Equipment and the Lease and/or the location and nature of the Equipment.

Following the public hearing, approval of the plan of finance for the Equipment and the Lease by the Local Government is necessary for the interest portion of rental payments under the Lease to be excludable from gross income for federal income tax purposes and in satisfaction of the requirements of Section 147(f) of the Code.

By order of the governing body of Burke County.

DATED: _____, 20__.

NORTH CAROLINA
BURKE COUNTY

Affidavit of Publication

Before the undersigned, a Notary Public of said County and State, duly commissioned, qualified, and authorized by law to administer oaths, personally appeared Brandon Bressner who being first duly sworn, deposes and says that he is A Registered Representative of The Paper, engaged in the publication of a newspaper known as The Paper, published, issued and entered as second class mail in the Town of Morganton, in said County and State; and that he is authorized to make this affidavit and sworn statement; that the notice or other legal advertisement, a true copy of which is attached hereto, was published in The Paper on the following dates:

5/30/2026

and that this said newspaper in which such notice, paper, document, or legal advertisement was published was, at the time of each and every publication, a newspaper meeting all of the requirements and qualifications of Section 1-597 of the General Statutes of North Carolina, 1996, as amended, and was a qualified newspaper within the meaning of Section 1-597 of the General Statutes of North Carolina.

This 30th day of May, 2026.

Sworn to and subscribed before me, this

30th day of May, 2026.

Notary Public
My commission expires:

OFFICIAL SEAL
JESSIE CATHERINE BORN
Notary Public, State of Illinois
Commission No. 991966
My Commission Expires June 06, 2028

VOLUNTEER FIRE DEPARTMENT PUBLIC HEARING LEGAL NOTICE

Notice is hereby given, as required by Internal Revenue Code Section 147 (f) the undersigned will hold public hearing on June 15, 2026 at 6:00pm at the location of the undersigned listed below to discuss its acquisition by lease purchase of a new Fire Truck and financial arrangements related thereto.

Maximum amount of issue: $483,265.00

All interested persons are invited to attend.

IN WITNESS WHEREOF, I have hereunto set my hand and official Seal at my office in Morganton this 27th day of May, 2026.

Jane Woodward
Secretary
Lake James Fire and Rescue, Inc.
3222 NC Hwy 126
Morganton, NC 28655
2721-347440
05/30/26

CR 347440

BURKE COUNTY

Jeff Brittain, Chair
Phil Smith, Vice Chair
Brian Barrier, Commissioner
Randy Burns, Commissioner
Mike Stroud, Commissioner

ALL ABOUT ADVANCING

Brian C. Epley, Co. Manager
Morgan Buchanan, Clerk to the Board
Destin Hall, County Attorney
Kania Law Firm, P.A., Tax Attorney
www.burkenc.org

Home Trust Bank

PO Box 10

Asheville, NC 28802-0010

October 12, 2026

To whom it may concern,

The funding for Lake James Fire and Rescue, Inc. has been progressive as per the following schedule:

FISCAL YEAR	ACTUAL/ANTICIPATED TAX REVENUE	ASSESSED VALUATION	RATE PER $100 VALUE
2027*	$370,000	$462,500,000	$0.08
2026	$359,000	$448,750,000	$0.08
2025	$347,000	$433,750,000	$0.08

*2027 is a revaluation year, revenue could be higher.

Sincerely,

Chandler Bumgarner

Interim Chief Financial Officer

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

ITEMS FOR DECISION

Subject Title: **TA - Approval of 2027 Schedule of Value and Present Use Schedule of Value**

Presented by: **Travis Isaacs, Tax Administrator**

Summary of Information: The Burke County Tax Office will present the proposed 2027 Schedule of Values, which establishes the appraisal methods, rates, adjustments, and procedures that will be used to value real property as part of Burke County's January 1, 2027 reappraisal. The presentation will provide an overview of the Schedule of Values, current market conditions, valuation methodologies, appraisal standards, and the process for property owner review and appeals

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

No. 4- Fiscal Stewardship

Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Approval is recommended.

Legal Review: Not Applicable

Suggested Motion: To receive information as presented and schedule a public hearing for November 16th for the 2027 Schedule of Values and the Present Use Schedule of Values, standards, and rules to be used in the 2027 reappraisal of real property in Burke County.

Burke County 2027 Schedule of Values

How every parcel will be valued for the January 1, 2027 reappraisal

Board of Commissioners · October 2026

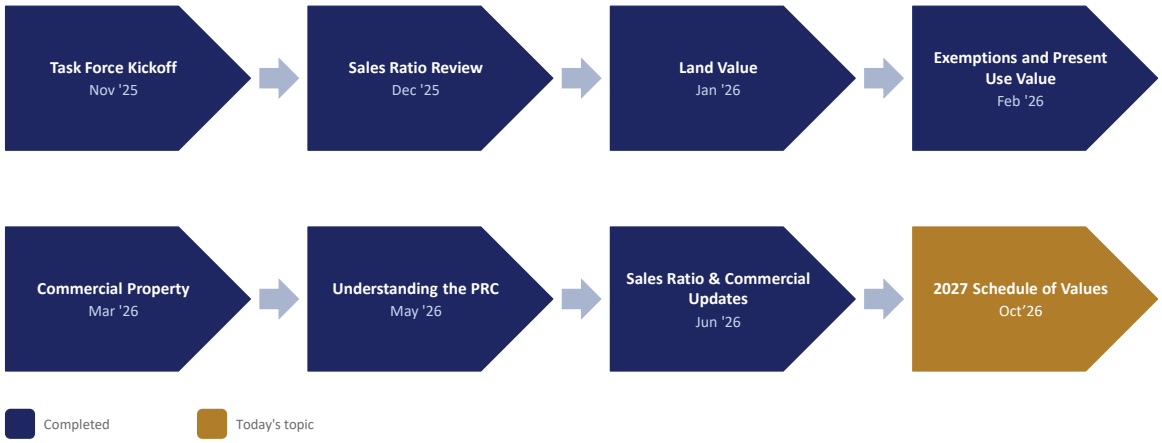
Burke County Tax Office

Seven sessions complete · today's topic

1

The Schedule of Values: the eight topics in the Property Tax Task Force series

Each meeting has built toward the document in front of you today



Burke County 2027 Schedule of Values · Property Tax Subcommittee briefing · 1

2

The SOV is the county's rulebook for valuing property

The published rates, adjustments and procedures every appraiser must follow to value real property at market as of January 1, 2027

Who it is written for

County appraisal staff

The single standard they work from in the field, so that 59,283 parcels are valued the same way

Property owners

So they can trace every figure on their Property Record Card back to a published rule

Appeal boards

The Board of Equalization & Review and the Property Tax Commission — the reference in any appeal

What it IS

- The method and the rate tables
- Adopted by the Board of Commissioners under G.S. 105-317
- Appealable to the Property Tax Commission for 30 days after adoption

What it is NOT

- Not the tax rate — the Board sets that separately, later
- Not any individual property's value — those come from applying the SOV
- Not a revenue decision — a reappraisal redistributes; it does not raise money

3

Reappraisal is not optional — state law sets the what, the when, and the how

The county's discretion is in the method; the mandate comes from Raleigh

Value at market

G.S. 105-283: all property appraised at 'true value in money' — market value. The county cannot value below market.

Reappraise on a cycle

G.S. 105-286: at least every 8 years. Burke chose 4 years in 2001. Last reappraisal 2023; next January 1, 2027.

Publish the schedules

G.S. 105-317: adopt uniform schedules 'sufficiently detailed' that appraisers can adhere to them. This document.

Oversight

NC Department of Revenue reviews county compliance and runs its own annual sales-ratio study.

Adoption steps under G.S. 105-317(c)

Oct 19	Schedules delivered to the Board; copy filed for public inspection
Oct 21	Notice of public hearing published
Nov 16	Public hearing on proposed schedules, and adoption
Nov 17 – Dec 16	Notice of adoption published 4 consecutive weeks
Dec 16	Last day to challenge the schedules' validity at the Property Tax Commission

2026 dates per the Tax Office adoption calendar.

4

2

Inside the 2027 Schedule of Values

The market it must reflect
Housing, land and the local economy since 2023

How a value is built
The record card, a worked parcel, and which approach controls

How the result is tested
The accuracy and uniformity standards written into the document

5

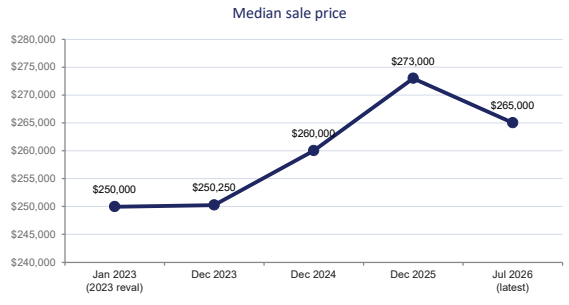
Housing: prices rose and have eased; the real story is supply

Single-family homes, Burke County, rolling 12 months — Canopy MLS

$250K → $265K
Median home sale price, 2023 reappraisal → 12 months to Jul 2026; peaked at $275,000 in Feb 2026

24 → 56 days
Average days on market, +133%

1.5 → 4.1 mo.
Months' supply of inventory, +173% and still rising





3

Burke County 2027 Schedule of Values · Property Tax Subcommittee briefing · 5

Task Force · Jun '26

6

Land outpaced housing while the local economy softened

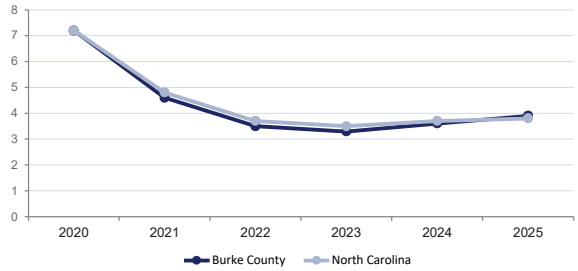
+20.9%
Median lot/acreage/farm price, $43,000 → $52,000 (volatile: peaked $57,500 in Nov 2024, fell to $45,500 by Jan 2026)

3.3% → 3.9%
County unemployment 2023 → 2025; above the state rate for the first time in the series

69%
Burke avg private wage ($49,020) as a share of NC ($70,672)

Tier One
2026 state designation — among the 40 most economically distressed counties

Annual average unemployment rate (%)



What this means for the 2027 values

- Population grew only 1.2% (87,570 → 88,655) and wages sit well below the state — neither explains the appreciation
- Where values rose fastest — Lake James, Lake Rhodhiss, Lake Hickory, the mountain areas — a meaningful share of demand came from outside the county
- Construction stayed active: 14,345 building-related permits, 2023 – Aug 2026
- Expect uneven change: some market areas up materially, others flat. That unevenness is exactly what a reappraisal corrects

Task Force · Jun '26

7

Nearly a third of parcels are exempt or deferred

Section 1-2, The Burke County Tax Base; present-use value carried in its own schedule

59,283
Real property parcels

68% / 32%
Improved / vacant share of parcels

29.45%
Of parcels exempt or deferred

Exempt — removed from the tax base

- Federal, State, County and municipal property — notably Pisgah National Forest, South Mountains State Park, Lake James State Park and the Catawba River corridor
- Property owned by religious, educational and other qualifying exempt organizations
- Still appraised at market value; simply not billed

Deferred — present-use value (G.S. 105-277.2 to .7)

- Agricultural, horticultural and forest land is appraised twice — at market and at present-use value — and taxed on the lower. The difference accrues as deferred tax on the parcel
- Rates are set by the State Use-Value Advisory Board by soil class and region, not by the County
- Applied for, with a continuing sound-management obligation; losing eligibility triggers rollback of deferred tax with interest

Task Force · Feb '26

8

4

Reading a Property Record Card: every field mapped to the section behind it

"Reading a Property Record Card" follows the foreword: a sample residential and a sample commercial card, identifiers removed, each field cross-referenced

PROPERTY RECORD CARD · Burke County

Parcel header 1
Township · Market Area · Land Class · Assessed Acreage · Total SFLA

Sales details 2
Type · Price · Date · Source · Qualification status

Land summary 3
Prime Site 0.50 ac · Balance 2.16 ac · Rate · Size Adj. Factor · Land Adjustment

Improvement summary 4
Type · Grade / QLTY · Year Built · Effective Year · Physical Depr. · % Complete

Building detail 5
Building Use & base rate · Heat / AC / walls / finish · Size Factor · Adjusted Base Rate
Refinements (plumbing, fireplaces) · Area types & rates · Functional / Economic % Bad

Miscellaneous improvements 6
Type · Size · Base price · Grade · Depreciation

Total Taxable Value 7

Where each block is explained

1. **Parcel header** 5-1 Land Valuation Process · 5-3 Building Uses · 5-5 Size Factor
2. **Sales details** 5-1, opening.
3. **Land summary** 5-1 Land Process · 5-2 Land Adjustments · Tables A-1 to A-4
4. **Improvement summary** 5-8 Quality Grade (Appendix 4A) · 5-10 Depreciation · 5-9 % Complete
5. **Building detail** 5-3 Building Uses · 5-4 Additions & Deductions · 5-5 Size · 5-6 Areas · 5-7 Refinements
6. **Miscellaneous improvements** 5-11 Miscellaneous Improvements
7. **Total Taxable Value** 5-12 Worked Example, Step 4 · 3-4 Reconciliation · exemptions and deferrals removed here

Commercial card: land, occupancy, class, area, depreciation map to Part VI (6-1 to 6-7); the Income Detail page maps to 6-8.

Task Force · May '26

9

A real parcel, priced from the published rates

Section 5-12 — a 2.66-acre Silvercreek parcel with a 2,483 sq ft dwelling built in 1935 and seven outbuildings

1 Land

$52,522

- Prime site: first 0.50 ac × $58,000 = $29,000
- Balance: 2.16 ac × $9,000 × 1.21 size factor = $23,522
- Rates from the market area; size factor from Table A-4, applied to the balance line only

+

2 Dwelling

$343,195

- Base $140.00/sf × 0.97 size factor = $135.80
- Main body 1,611 sf + $10,100 refinements; upper story 872 sf; porches, deck, utility at their own rates
- Grade B-8 × 1.12 → replacement cost new $423,698
- Eff. year 2003, Average condition → 19% depreciation

+

3 Misc. improvements

$2,778

- Seven sheds and lean-tos, 1953–1980
- Each priced from its own table at grade C
- Each depreciated on its own effective age (72–75%)

=

4 The parcel

$398,495

- Land + dwelling + misc., added
- Printed as Total Taxable Value on the card
- No exemption or deferral applies here; where one does, it is removed at this step

Every figure above comes from a published table: land rates and size adjustment (A-1 to A-4), residential base rates and size factors (B tables, Appendix 16), grade factors (Appendix 4A), depreciation (Appendix 15).

Task Force · Jan '26

10

One primary approach for each property type

Section 3-4, Reconciliation — cost calibrated to sales for homes; income leads for investment property

Property type	Primary approach	In plain terms
Vacant land	Sales comparison	What comparable land is actually selling for
Single-family homes, manufactured homes	Cost, calibrated to market by area	What it would cost to rebuild, less wear, checked against local sales
Condos / townhouses	Cost, calibrated to market by area	Homogeneous units — sales support directly
Apartments, retail, office, hotels, industrial	Income	What an investor would pay for the income stream
Special-purpose, institutional, churches	Cost	No rental market to observe — cost is the only evidence

Commercial record card

Land, occupancy code and rate, class, area and story height, and depreciation each map to Part VI (6-1 to 6-7). The Income Detail page — unit income, vacancy, expenses, overall rate — maps to 6-8.

Where judgment enters

Quality grade, condition rating, land influence factors and obsolescence are appraiser judgments — exercised inside published ranges and supported by market evidence. That is what makes 59,283 values uniform.

Task Force · Mar '26

11

The tests the 2027 values will be held to

Standards drawn from the IAAO Standard on Mass Appraisal; proposed for adoption in the SOV

Accuracy

Median assessment level

90% – 110%

The middle appraised-value-to-sale-price ratio. At 100% the group is valued at what it sold for. Applies countywide and, as far as practical, to each market area.

Uniformity

Coefficient of dispersion (COD)

10% – 25%

How far individual ratios scatter around the median. Low = like properties valued alike. Tighter for newer subdivisions (10%), looser for rural (20%) and vacant land (25%).

Fairness across price

Price-related differential (PRD)

0.98 – 1.03

Whether high- and low-value properties carry the same share. Above 1.03 means lower-value properties are valued at a higher percentage of market than expensive ones.

Two things the standards make explicit

- "As far as practical": some market areas have too few qualified sales in four years for a reliable statistic. There, the number is reported and the limitation stated — not treated as pass/fail on evidence that cannot carry the weight.
- These are Burke's own adopted standards, separate from the annual sales-ratio study the Department of Revenue runs under G.S. 105-289(h).

Task Force · Dec '25

12

6

What this means for property owners: values change, revenue does not — and every value can be appealed

The two questions every constituent will ask

"Will my taxes go up?"

- A reappraisal does not raise revenue. The Tax Administrator sets value; the Board of Commissioners sets the rate — separately, and afterward.
- State law (G.S. 159-11(e)) requires the Board to publish a revenue-neutral rate: the rate that would raise the same money as today's rate with no reappraisal.
- A bill rises or falls depending on how a property's value changed relative to the county as a whole, and on the rate the Board adopts.
- Properties that appreciated faster than average (e.g., lakefront, mountain) tend to see a larger share; those that lagged, a smaller one. That rebalancing is the point.

"What if I disagree with my value?"

1. **Informal review**
   File with the Tax Office within the window on the notice. An appraiser reviews, may inspect, replies in writing. Fastest step; most appeals resolve here.

2. **Board of Equalization & Review**
   Formal appeal; hearing before the county board; decision mailed within 30 days. Board may raise, lower or sustain.

3. **NC Property Tax Commission**
   Within 30 days of the Board's decision; further appeal to the Court of Appeals.

Values are presumed correct; the owner carries the burden of showing the method was arbitrary or illegal and the value substantially exceeds market. Evidence should speak to value as of January 1, 2027.

13

Reference: where each Task Force topic lives in the Schedule of Values

Sales Ratio Review	Dec '25	Part IV — Sales Analysis System; Principles of Uniform Assessment
Land Value	Jan '26	Part V — Land Valuation Process, Land Adjustments; Tables A-1 to A-4
Exemptions & Present Use Value	Feb '26	Section 1-2 — Tax Base; separate Present-Use Value schedule
Commercial Property	Mar '26	Part VI — Commercial and Industrial; Appendix 14 income models
Understanding the PRC	May '26	"Reading a Property Record Card" — front of the document
Sales Ratio & Commercial Updates	Jun '26	Section 1-3 — Market Conditions; 3-4 Reconciliation

14

7

Key Dates for the 2027 Schedule of Values

Oct 19, 2026	Schedules delivered to the Board (N.C.G.S. 105-317)
Oct 20, 2026	Notice of Public Hearing published
Nov 16, 2026	Public hearing on proposed Schedules & Adoption
Nov 18 – Dec 16, 2026	Notice of Adoption published (4 consecutive weeks)
Dec 16, 2026	Last day to challenge the Schedule's validity (NC Property Tax Commission)

15

Questions and discussion

Adopting the Schedule of Values commits the county to a method — not to any value, and not to a tax rate.

KEY DATES AHEAD

Oct 19
Schedules delivered to the Board; public inspection opens

Nov 16
Public hearing and adoption

Jan 1, 2027
Effective date of all values

8

16

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

REPORTS AND COMMENTS

Subject Title: **BOC - Reports and Comments**

Presented by: **Jeffrey C. Brittain, Chairman**

Summary of Information: Reports and Comments from Commissioners and staff will be accepted at this time.

Strategic Plan Focus Area Alignment:
Not Applicable

Budgetary Effect: Not Applicable

County Manager's Recommendation: Not Applicable

Legal Review: Not Applicable

Suggested Motion: No motion required.

ZONING PERMITS 2026	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YEARLY
	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	TOTALS
RESIDENTIAL ZONING PERMIT	60	77	84	74	79	85	67	83	67				**676**
COMMERCIAL ZONING PERMIT	4	7	13	3	2	6	2	6	4				**47**
MINOR SHORELINE PERMIT	0	5	12	6	6	8	8	8	7				**60**
MAJOR SHORELINE PERMIT	0	1	5	0	2	1	1	0	2				**12**
NEW CELL TOWER	0	0	0	0	0	0	0	0	0				**0**
MINOR SITE PLAN REVIEW	2	0	1	0	0	3	0	0	0				**6**
MAJOR SITE PLAN REVIEW	2	0	0	0	1	1	0	1	0				**5**
MINOR SUBDIVISION REVIEW	5	4	10	11	11	11	9	10	9				**80**
MAJOR SUBDIVISION REV PRELIM	0	0	0	0	0	0	0	0	0				**0**
EXEMPT SUBDIVISION REVIEW	3	3	6	9	3	7	5	6	7				**49**
CELL TOWER UPGRADE REVIEW	1	1	0	0	0	2	0	1	1				**6**
REZONING APPLICATION	0	0	1	3	0	0	2	0	0				**6**
SPECIAL USE APPLICATION	0	1	0	0	0	0	0	0	0				**1**
ZONING CONFORMITY LETTER	5	1	0	1	2	1	4	1	2				**17**
ZONING VARIANCE	0	0	1	0	0	0	0	0	0				**1**
STREET SIGN ISSUANCE	1	0	0	3	0	0	0	0	1				**5**
NEW SIGN PERMIT	0	1	0	0	2	**2**	3	0	0				**8**
FLOODPLAIN PERMIT	0	0	0	0	0	0	0	0	0				**0**
ZONING APPEAL	0	0	0	0	0	0	0	0	0				**0**
VARIANCE APPLICATION	1	0	0	0	0	0	0	0	1				**2**
ZONING MONTHLY TOTAL	**84**	**101**	**133**	**110**	**108**	**127**	**101**	**116**	**101**	**0**	**0**	**0**	**981**

BUILDING PERMITS 2026	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YEARLY
	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	TOTALS
NEW COMMERCIAL	0	0	0	0	1	0	4	0	2				**7**
NEW CHURCH	0	0	0	0	0	0	0	0	0				**0**
NEW CELL TOWER	0	0	0	0	0	0	0	0	0				**0**
CELL TOWER EXISITNG	2	0	0	0	1	0	0	0	0				**3**
COMMERCIAL POOL	0	0	0	0	0	0	0	0	0				**0**
20% COMMERCIAL REMODEL/SHELL	1	1	0	1	2	0	1	1	2				**9**
COMMERCIAL BUILDING ONLY	5	1	7	6	5	2	4	3	5				**38**
COMMERCIAL ELECTRICAL ONLY	3	7	11	6	8	8	3	8	7				**61**
COMMERCIAL MECHANICAL ONLY	0	3	6	2	4	3	7	3	6				**34**
COMMERCIAL PLUMBING ONLY	0	1	1	0	1	2	1	1	1				**8**
COMMERCIAL ALL TRADES	4	0	0	0	0	0	0	4	0				**8**
NEW DUPLEX	0	1	1	3	1	1	0	1	0				**8**
NEW SINGLE FAMILY HOME	31	36	42	42	30	39	45	34	33				**332**
SINGLE FAMILY ATTACHED	0	0	0	0	0	0	0	0	0				**0**
MODULAR HOME	4	1	2	6	0	5	6	3	0				**27**
NEW SINGLE WIDE MOBILE HOME	5	6	2	4	2	5	4	5	4				**37**
NEW DOUBLE WIDE MOBILE HOME	3	10	8	12	12	12	11	16	11				**95**
NEW OTHER SHELTER	0	0	0	0	0	0	0	0	0				**0**
NEW TOWNHOUSE	0	0	0	0	0	0	0	4	0				**4**
RESIDENTIAL BUILDING ONLY	13	6	17	10	19	19	31	22	30				**167**
RESIDENTIAL ELECTRICAL ONLY	24	30	45	51	39	40	51	40	42				**362**
RESIDENTIAL MECHANICAL ONLY	33	40	67	45	51	69	53	36	54				**448**
RESIDENTIAL PLUMBING ONLY	5	2	8	14	6	14	6	9	8				**72**
RESIDENTIAL ALL TRADES MINIMUM	0	0	1	4	0	0	0	4	0				**9**
RESIDENTIAL ADDITION	7	1	7	9	7	8	9	1	3				**52**
RESIDENTIAL REMODEL	23	18	21	19	14	5	13	18	15				**146**
RESIDENTIAL STORAGE BUILDING	4	7	5	5	2	5	5	10	10				**53**
NEW GARAGE /CARPORT	3	8	7	14	26	9	16	17	6				**106**
NEW DOCK	4	1	4	4	3	2	4	1	2				**25**
NEW COMMERCIAL POOL	0	0	0	0	0	0	0	0	0				**0**
NEW RESIDENTIAL POOL	0	1	4	6	6	1	7	3	1				**29**
DECK/PORCH	3	1	4	12	8	5	5	9	5				**52**
FOUNDATION/REPAIR	0	0	0	0	0	0	0	0	0				**0**
SOLAR	0	0	0	0	0	0	0	0	0				**0**
ABC	0	2	0	0	4	1	0	1	0				**8**
GENERATOR	0	0	0	0	0	0	0	0	0				**0**
RETAINING WALL	1	0	0	0	0	0	0	0	0				**1**
DEMOLITION	0	5	0	0	0	0	0	4	5				**14**
New Daycare	0	0	0	1	0	0	0	0	0				**1**
BUILDING INSPECTIONS MONTHLY TOTAL	**178**	**189**	**270**	**276**	**252**	**255**	**286**	**258**	**252**	**0**	**0**	**0**	**2216**

	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	YTD Avg.
Door Count													
Morganton	4698	4228	3711										4212.33
Valdese	1774	1593	1649										1672.00
CB Hildebrand	1894	1426	1288										1536.00
TOTAL:	**8366**	**7247**	**6648**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**7420.33**
Study/Meeting Room Use													
Morganton	86	69	70										75.00
Valdese	126	46	60										77.33
CB Hildebrand	71	53	89										71.00
TOTAL:	**283**	**168**	**219**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**223.33**
Programs -- Remote and In-Person													
Adult	17	14	20										17.00
Young Adult	12	12	17										13.67
Children	69	52	86										69.00
TOTAL:	**98**	**78**	**123**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**99.67**
Program Views/ Attendance													
Adult	458	251	880										529.67
Young Adult	145	144	155										148.00
Children	2531	1866	2420										2272.33
TOTAL:	**3134**	**2261**	**3455**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**2950.00**
Pickup Bags													
Adult	83	91	260										144.67
Young Adult	0	0	20										6.67
Children	24	20	15										19.67
TOTAL:	**107**	**111**	**295**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**171.00**
Volunteers -- Number													
Adult	18	25	38										27.00
Young Adult	1	1	1										1.00
	19	**26**	**39**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**28.00**
Volunteers -- Hours													
Adult	137.25	140	231.25										169.50
Young Adult	4.75	1	4.5										3.42
	142	**141**	**235.75**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**172.92**
E-Book Users -- Total	6462	6539	6591										
E-Book Users -- Unique	1182	1200	1142										**1174.67**
E-Book Checkouts	5412	5814	5735										**5653.67**
Print Book Users -- Unique	1234	1113	1035										
Overall Circulation	24271	22705	21851										**22942.33**
Turnover Rate (Print) >= 0.14	0.17	0.15	0.15										**0.157**
Tunrover Rate (Digital)>=0.14	0.20	0.21	0.20										**0.203**
Ebook Requests	722	729	872										**774.333**
Ebook Requests Cost	$35,294	$37,274	$42,811										**$38,460**
Computer Sessions	836	830	969										**878.33**
New/Renewed Borrowers	191	165	161										**172.33**
NC Cardinal RS Items Out	2015	2174	2219										**2136.00**
NC Cardinal RS Items In	2056	2022	2236										**2104.67**
NC Cardinal RS Items TOTAL	4071	4196	4455	0	0	0	0	0	0	0	0	0	**1060.17**
RS Time/Item <= 2.5 minutes	2.42	2.47	2.3										**2.40**
HappyOrNot Kiosk -- MPL -- Goal is 90%	94	90	99										**94.33**
Social Media -- Facebook and Instagram													
Social Media Followers	8633	8722	8808										**8721.00**
Soccial Media Staff Posts	131	135	143										**136.33**
Social Media Reach # that see library content	128040	125065	121211										**124772.00**
Social Media Engagement # of interactions with content	11992	8924	9427										**10114.33**
Social Media Video Views	1310	1386	939										**1211.67**

OCTOBER PROGRAMS FOR ADULTS

BURKE COUNTY

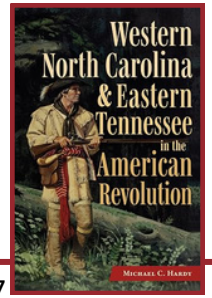
Live Well @ your library — Burke County Public Library

THE LIBRARY FOUNDATION OF BURKE COUNTY

FRIENDS of the Burke County Public Library

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

MPL: Morganton Public Library (828-764-9261)
VPL: Valdese Public Library (828-874-2421)
CBH: C.B. Hildebrand Public Library (828-764-9283)
** = pre-registration required



DID YOU KNOW?

Wednesday, October 7, 2026, is the 246th anniversary of the Battle of Kings Mountain.

2 **Needlework in the Morning**
10am-Noon at VPL

Bibliomaniacs
A FREE Monthly Subscription box for Adult book lovers!
Boxes include a library book & fun items relating to the theme. Boxes available **Monday, October 12** (first-come, first-served basis while supplies last).

5 **Autumn Collage**
5:30pm at CBH**
Pre-registration is required.

6 **Savory Spice Club Spice Pick Up****
Pre-registration required.
Participants will receive a call when pick-up is available.

7 Exhibit kickoff, reception and book signing with historian **Michael C. Hardy**
6pm at MPL

8 **Savory Spice Chop Shop**
5:30pm at VPL**
Pre-registration required, but you do not need to be registered for the Savory Spice Club to attend.

9 **Needlework in the Morning**
10am-Noon at MPL

12 **Tarheel Terrors**
with storyteller **Liz Pardue**
6pm at MPL



PARTNERS Improving Lives. Strengthening Communities.
14 EDUCATIONAL LUNCH SERIES
Depression and Stress Management for Caregivers
Wed., Oct. 14, from 12-1pm at MPL
No registration. Bring your lunch.
Snacks & bottled water provided. CEU's available.

AMERICA 250 NC BURKE COUNTY
Traveling Exhibits:
March to Kings Mountain and **Forging a Nation**
Available in the Kistler Wing of MPL from October 7-30.

17 **Beginning Genealogy Workshop**
MPL 10am-Noon**
Class taught by Burke Co. Genealogical Society member Phillip Heavner. Pre-registration is required (call 828-764-9266).

19



20 **Plot Hounds**
Book Discussion
10am at VPL

21 Author Chat & book signing with local author **Aaron Kohrs**
6pm at MPL



22 **CROCHET CAFE**
6PM AT VPL
A needlework program for YA & adults.

23 **Needlework in the Morning**
10am-Noon at MPL

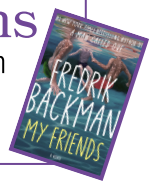
Happily Ever Afters Anonymous Book Club
Open to Adults and Teens.
Friday, October 23: CBH 4pm



26 **Mixed Media Monday**
6pm at MPL**
Pre-registration required.

27 **Cauldron, Boil Me!**
6pm at VPL**
Fall Soups and Teas!
Pre-registration required.
Open to Adults and Teens.

28 **Oxymorons**
New Adult Book Discussion
6pm at MPL
Open to Adults and Teens



29 **Fall Card-Making Class**
5:30pm at VPL**
Pre-registration required.

30

31

OCTOBER PROGRAMS FOR TEENS

MPL = Morganton Public Library
VPL = Valdese Public Library
CBH = C.B. Hildebrand Public Library

Live Well @ your library — Burke County Public Library

BURKECOUNTY

Friends of the Burke County Public Library

The Library Foundation of Burke County

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

Young Adult Services (YAS) programs are limited to middle and high school students only unless otherwise noted.

YALSA Young Adult Library Services Association

TEENtober

What will you discover at the library?

www.ala.org/yalsa/teentober

5 **D&D @ the Library**** 4:30pm (CBH)

6 **DIY Fairy Mirrors**** 6pm (VPL)

7 **Homeschool Libratory** 11am (CBH)

8 **Crow Party** 4pm (MPL)

12 **Game Night** 6pm (CBH)

13 **Homeschool Libratory** 11am (VPL)

20 **D&D @ the Library**** 4:30pm *(online via Discord)*

21 **Homeschool Libratory** 11am (MPL)

22 **++ Crochet Cafe** 6pm (VPL)

23 **++ Happily Ever Afters Anonymous Book Club** 4pm (CBH)

26 **DIY Book Page Witch**** 6pm (CBH)

27 **++Cauldron, Boil Me! A Romantasy Celebration** 6pm (VPL)

28 **++ Oxymorons New Adult Book Discussion** 6pm (MPL)

29 **Frankentoy Faux Taxidermy**** 4pm (MPL)

*Programs marked with a ** require pre-registration with the YAS Coordinator at 828-764-9273 or lizzie.whisnant@burkenc.org.*

**** = pre-registration required | ++= open to adults and teens**

OCTOBER PROGRAMS FOR KIDS

BURKE COUNTY

Live well @ your library — Burke County Public Library

THE LIBRARY FOUNDATION OF BURKE COUNTY

FRIENDS of the Burke County Public Library

WEEKLY STORYTIMES

Pre-registration is required. Call the library or stop by to sign up.

Morganton Public Library
828-764-9274

Baby Bookworms (birth-24 months)
Mondays at 10:30am

Terrific Tots (2 year olds)
Tuesdays at 10:30am

Preschool Pals (3-5 year olds)
Thursdays at 10:30am

Library Explorers (K-2nd graders)
Tuesdays at 4:00pm

Cool Kids Club (3rd-5th graders)
Mondays at 3:30pm

Valdese Public Library
828-874-2421

Baby Bookworms (birth-24 months)
Thursdays at 10:00am

Terrific Tots (2-3 year olds)
Mondays at 10:00am

Preschool Pals (4-5 year olds)
Wednesdays at 10:00am

Library Explorers (K-2nd graders)
Mondays at 3:30pm

Cool Kids Club (3rd-5th graders)
Tuesdays at 3:30pm

C.B. Hildebrand Public Library
828-764-9283

Baby Bookworms and Terrific Tots (birth-2 year olds)
Thursdays at 10:45am

Preschool Pals (3-5 year olds)
Tuesdays at 10:45am

Family Storytime (all ages)
Wednesdays at 10:45am

Library Explorers (K-2nd graders)
Thursdays at 3:30pm

Cool Kids Club (3rd-5th graders)
Tuesdays at 3:30pm

MPL: Morganton Public Library (828-764-9261)
VPL: Valdese Public Library (828-874-2421)
CBH: C.B. Hildebrand Public Library (828-764-9283)
** = pre-registration required

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					3 **Welcome Fall DIY Scarecrow Program** **10-11:30am at VPL**** For kids in K-5th grade. Pre-registration is required.
5	6	7 **Spooky Squishes and Slime** **4-5:30pm MPL** Program is for children in K-5th grade.	*Monthly Scavenger Hunts at MPL & CBH and I-Spy-Tank at VPL* Have you joined the fun yet? Visit each of our libraries for a fun, self-guided experience. For kids; one prize per child (per site, per month). This month's themes: *MPL: The Curse of the Library Ghost* *CBH: Bats* *VPL: Spooky Season I-Spy-Tank*		10 **Great Pumpkin Painting Program** **MPL 11-3pm (Drop-in)** For Kids 12 and under.
12 THE SCHIELE MUSEUM — THE TRAVELING PUMPKIN PATCH	13 **TRAVELING PUMPKIN PATCH** **CBH 4pm**** For children K-5th grade. Pre-registration required.	14 Weaving Wonders Spider Webs **3:30pm at CBH**** Program is for children ages 5-12. Pre-registration required.	eco EXPLORE **IT'S ARACHNOLOGY SEASON!** Become a Citizen Scientist and join ecoExplore! More information on the program can be found at EcoExplore.net, or visit your library for information and bi-monthly worksheets.	16 **Family Fun Friday** **CBH 10-11:30am**	17
19 **BRAIN TEASER BONANZA** Drop in from 5:30-7:00pm at CBH. For all ages.	20 KidSenses Children's Interactive Museum **Spooky Science** Tues., Oct. 20: 3:30pm at CBH No registration required. All ages. **Fall Festival** **Tues., Oct. 20: 5pm at VPL** For kids 5th grade and under.	21 Kids Cooking Club Mummy Pizzas **3:30pm on Zoom**** (Register at CBH). Program is for children in 3rd-5th grade.		23 ecoEXPLORE arachnology	24 **Not-So-Spooky Saturday Storytime** **10-11am MPL** Program is for children 0-3 years old.
26	Local Family Organizations, Face Painting, Mini Pie Eating Contest, Balloon Artist, Games, Crafts, and more.		29	31 **Trick or Read!** **Sat., Oct. 31: VPL 9am-4:30pm (Drop-in)** Trick-or-Treat & Halloween Craft! For kids 5th grade & under **Monster Makers Craft Program** **Sat., Oct. 31: MPL 11-3pm (Drop-in)** For kids 12 and under.	

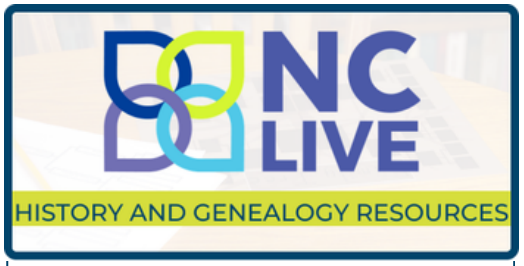
OCTOBER IS FAMILY HISTORY MONTH: START YOUR SEARCH AT THE LIBRARY!



Access billions of names in thousands of genealogical databases including Census and Vital Records, birth, marriage and death notices, the Social Security Death Index, Passenger lists and naturalizations, Military and Holocaust Records, City Directories, New York Emigrant Savings Bank records, and African American and Native American Records. Sponsored by the Friends of the Burke County Public Library and the NC Room.



BCPLS is a FamilySearch affiliate library! Affiliate libraries have access to FamilySearch's digital genealogical collections that are otherwise accessible only through a FamilySearch center (due to legal, privacy, and contractual agreements). Users can search for birth, marriage, census, and other official documents, build their family tree, and access resources like the FamilySearch Wiki and Full-Text Search for guided research.



Use your library card and password/PIN to log into NCLIVE.ORG for access to a variety of historical and genealogical resources. Resources like HeritageQuest can be found alongside historic newspapers, diaries, and records.
NC LIVE is accessible from anywhere you have internet access.



Visit DigitalNC.org for access to a variety of historical materials from cultural heritage repositories across North Carolina. Featured resources here include digital access to historic newspapers and yearbooks.

DigitalNC is accessible from anywhere you have internet access.

Ancestry Library Edition and FamilySearch are available at Morganton, Valdese, and C.B. Hildebrand branch libraries. Access is granted on-site only to library computers and on personal devices connected to the library wi-fi.

Don't forget about the North Carolina Room, located on the main floor of the Morganton Public Library. Established in 1969, this non-circulating collection of local history and genealogy resources for Burke County and western North Carolina focuses on local history, biography, travel, government, culture, folklore, and genealogy. It contains many rare and out of print materials, files on local history subjects, school yearbooks, as well as an archive of The News Herald newspaper. It is also the home of Picture Burke, a digital collection of historic local photographic images. The NC Room resources are available for use during normal library hours of operation however, it is best to call ahead to check staff availability if you need individual assistance.

Live Well @ your library
Burke County Public Library
Morganton • Valdese • C.B. Hildebrand

BURKE COUNTY

THE LIBRARY FOUNDATION OF BURKE COUNTY

FRIENDS of the Burke County Public Library

We're online @ www.bcpls.org
Facebook @bcpls and Instagram @bcplsnc

October 2026

This month, we're taking time to recognize Breast Cancer Awareness Month, prepare for Medicare Open Enrollment, and, of course, have a little Halloween fun along the way.

October is a time to raise awareness about breast cancer and, just as importantly, to stand beside those whose lives have been touched by it. We honor those currently fighting, celebrate survivors, remember those we have lost, and recognize the family members, friends, and caregivers who walk this journey alongside them.

Breast cancer remains one of the most commonly diagnosed cancers in the United States. The American Cancer Society estimates that in 2026, more than 321,000 women will be diagnosed with invasive breast cancer, along with an estimated 2,670 cases in men. Sadly, more than 42,000 people are expected to lose their lives to breast cancer this year. But there is also reason for hope. According to the American Cancer Society, the 5-year relative survival rate for women whose breast cancer is diagnosed while it is still localized is greater than 99%. When looking at breast cancer across all stages combined, the 5-year relative survival rate is 92%.

Those numbers represent more than statistics—they represent mothers, daughters, sisters, spouses, friends, neighbors, and members of our own communities.

This October, let's wear our pink, encourage one another to stay informed about breast health and recommended screenings, and most of all, offer a little extra support and kindness to those facing cancer. To every survivor, fighter, caregiver, and loved one: we see you, we support you, and we celebrate your strength.

Medicare Open Enrollment begins October 15 and runs through December 7. During this period, Medicare beneficiaries can review their health and prescription drug coverage and make changes for the coming year. We know many of you look forward to meeting with our SHIIP counselors each year. Unfortunately, there are no appointments available at either Senior Center this Open Enrollment season. But don't worry—there are still ways to get help! Turn to page 14 for other options and resources for getting your Medicare questions answered and reviewing your coverage. And remember, you don't have to navigate it all alone!

Of course, it wouldn't be October without a little Halloween spirit! We're excited about our upcoming Halloween Party and look forward to an afternoon filled with fun, fellowship, games, treats, and plenty of reasons to smile. So grab your favorite costume, festive accessories, or simply your best Halloween spirit and come celebrate with us. No tricks—just treats and a whole lot of fun!

As the leaves change and the days get a little shorter, we're grateful for another October spent together at East Burke Senior Center. So stop by and join us for a program, stop by for information, catch up with friends, or enjoy some Halloween mischief.

Daily Activities

Instructor Fees:

ANY CLASS WITH AN INSTRUCTOR FEE ($) IS LISTED IN THE COST PER CLASS.
THESE FEES ARE SET BY AND PAID DIRECTLY TO THE INSTRUCTOR.

Monday

9:00 AM AEROBICS
9:00 AM RUMMIKUB
10:00 AM TAI CHI ($ DONATION)
10:45 AM YOGA ($ DONATION)
3:00 PM COFFEE & COLORING
2:00 PM MOVIE MATINEE
2:00 PM SEWCIALIZE
4:00 PM CORN HOLE
5:30 PM SIT-N-STRETCH

Tuesday

9:00 AM AEROBICS
10:00 AM WII BOWLING
1:00 PM RAID THE CRAFT CLOSET
2:00 PM SEWCIALIZE
2:00 PM LINE DANCING WITH CELIA
($1/BEGINNER 1 CLASS/$2/BASICS & ABOVE)

Wednesday

9:00 AM AEROBICS
10:00 AM CHAIR TAI CHI ($ DONATION)
10:30 AM CHAIR YOGA ($ DONATION)
12:00 PM HAND & FOOT
1:00 PM CROSS STITCH
2:00 PM SEWCIALIZE
2:30PM PINOCHLE CARDS

Thursday

9:00 AM AEROBICS
10:00 AM PHASE 10
11:00 AM RECIPE SWAP MEET
12:30 PM COMPUTER COACHING BY APPOINTMENT
2:00 PM SEWCIALIZE

Friday

9:00 AM AEROBICS
10:00 AM TAI CHI ($ DONATION)
10:45 AM YOGA ($ DONATION)
1:00 PM PHASE 10
2:00 PM SEWCIALIZE
3:00 PM WII GAMES

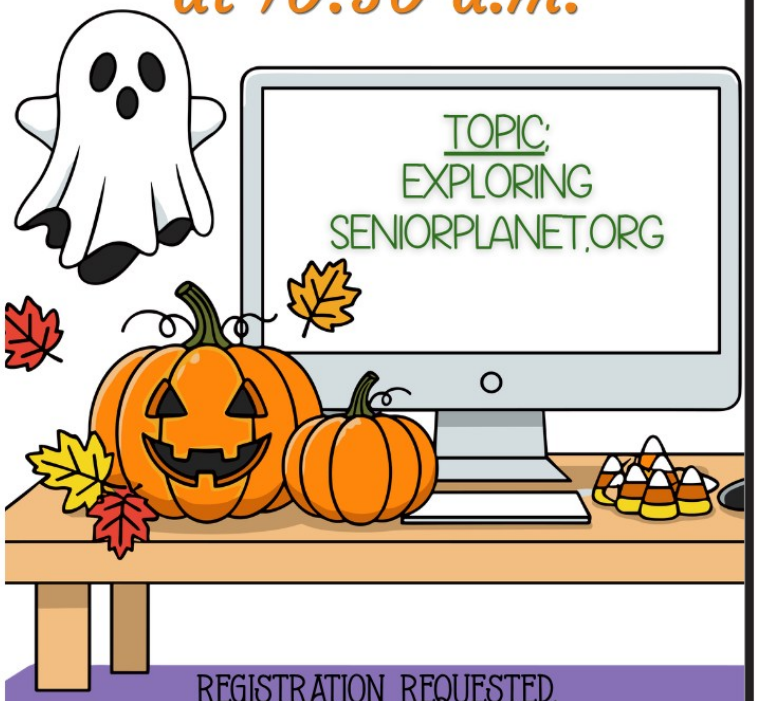
Drop-In Activities

- BILLIARDS - TWO TABLES AVAILABLE
- BLOOD PRESSURE CHECKS ON THE 2ND & 4TH WEDNESDAYS
- BOARD GAMES
- CARD GAMES
- COLORING & WORKBOOKS
- COMPUTER LAB - 2 COMPUTERS &
- EXERCISE ROOM
  - TREADMILLS
  - ELLIPTICALS
  - BOWFLEX
  - RECUMBENT BICYCLES
  - MEDICINE BALL
  - FREE WEIGHTS
- WIFI AVAILABLE
- CORNHOLE BOARDS
- DROP-IN PROGRAMMING
- HORSESHOES
- LIBRARY WITH BOOKS & DVDS
- PING PONG (PLEASE CALL AHEAD)
- PUZZLES
- SHUFFLEBOARD TABLE
- WII GAMES
- AND MORE!



TECH CLASS

Thursday, October 1st at 10:30 a.m.



REGISTRATION REQUESTED.

DIGITAL COUPONING



REGISTRATION REQUESTED.

Witch-Craft

Monday, Oct. 5th at 10:30 a.m.



FINAL CREATIONS WILL VARY. ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

Pottery



Monday, October 5th at 1 p.m.

and

Wednesday, October 28th at 10 a.m.

ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

SEWING CRAFT
Fabric Basket

Tuesday, October 6th at 10:30 a.m.



FINAL CREATIONS WILL VARY. ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

GROUP
LINE DANCE



Every Tuesday
2:00 - 3:00 p.m.

Instruction by Celia

$2 for Intro Class - $1 for beginner class
Paid to instructor

BINGO

REFRESHMENTS, PRIZES & FUN!

WEDNESDAY, OCTOBER 7TH AT 10:30 A.M.
WITH THE GREENS

THURSDAY, OCTOBER 15TH AT 2:30 P.M.
WITH GRACE HEIGHTS

THURSDAY, OCTOBER 22ND AT 2 P.M.
WITH HOPSCOTCH

Registration required for each event date.

Halloween Wood Pumpkin Craft



Wednesday, October 7th at 2 p.m.

FINAL CREATIONS WILL VARY. ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

4

HALLOWEEN SIGN

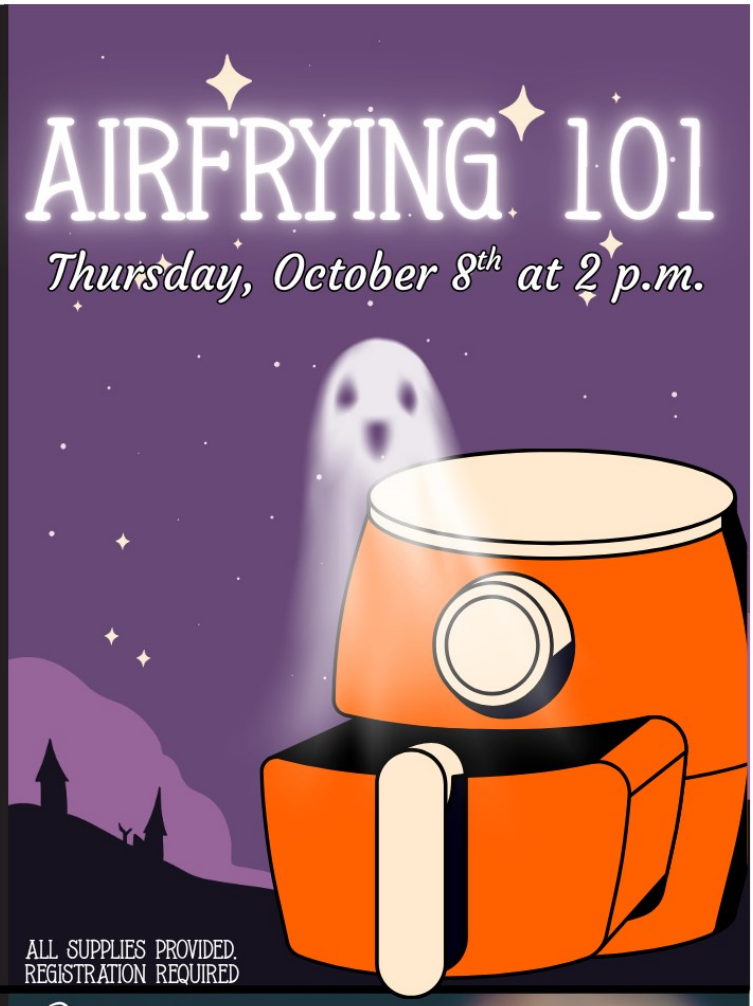


Thursday, October 8th at 10:30 a.m.

FINAL CREATIONS WILL VARY. ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

AIRFRYING 101

Thursday, October 8th at 2 p.m.



ALL SUPPLIES PROVIDED.
REGISTRATION REQUIRED

VETERANS SERVICES OFFICER ON-SITE HOURS

October

Friday, October 9th &
Friday, October 16th
9 am - 12 pm

THE BURKE COUNTY VETERANS SERVICES OFFICE ASSISTS ELIGIBLE VETERANS, THEIR DEPENDENTS AND/OR SURVIVING SPOUSES, CHILDREN OF DECEASED VETERANS, MEMBERS OF THE RESERVES OR NATIONAL GUARD, AND ACTIVE-DUTY SERVICE MEMBERS IN APPLYING FOR BENEFITS AND SERVICES FROM THE DEPARTMENT OF VETERANS AFFAIRS AND NORTH CAROLINA DIVISION OF VETERANS AFFAIRS.

Coffee Social at Living Beans

FRIDAY, OCTOBER 9TH AT 10:30 A.M.



RSVP REQUIRED. ALL PARTICIPANTS RESPONSIBLE FOR THEIR OWN TRANSPORTATION AND ALL COSTS.

5

LUNCH & LEARN WITH UNC HEALTH

FRIDAY, OCTOBER 9TH
AT 11:30 A.M.

BRING YOUR OWN LUNCH OR
LIGHT REFRESHMENTS WILL BE AVAILABLE.

REGISTRATION REQUESTED



Cooking Class with the COOPERATIVE EXTENSION



FRIDAY, OCTOBER 9TH AT 2 P.M.

NC COOPERATIVE EXTENSION

ALL SUPPLIES PROVIDED.
REGISTRATION REQUIRED

LET'S PLAY

LCR® Left Center Right™

LCR (LEFT, CENTER, RIGHT) IS A FAST-PACED DICE GAME WHERE PLAYERS PASS CHIPS LEFT, RIGHT, OR TO A CENTRAL POT BASED ON DICE ROLLS, WITH THE LAST PLAYER HOLDING CHIPS WINNING THE POT!

FRIDAY, OCTOBER 9TH AT 2 P.M. &
FRIDAY, OCTOBER 23RD AT 2 P.M.

REGISTRATION REQUESTED. ALL SUPPLIES PROVIDED.

MORNING STRETCH WITH RESISTANCE BANDS

Monday, October 12th &
Monday, October 26th
at 11 A.M.



BANDS PROVIDED, OR BRING YOUR OWN.
PRE-REGISTRATION REQUSTED, BUT NOT REQUIRED.

Pumpkin Door Hanger



Tuesday, October 13th
at 10:30 a.m.

FINAL CREATIONS WILL VARY. ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

BLOOD PRESSURE CHECKS

EVERY 2ND & 4TH WEDNESDAY
FROM 8:30 TILL 9:00 A.M.
THIS MONTH S CHECKS WILL BE ON
OCTOBER 14TH & 28TH.



East Burke PHARMACY

DROP IN AND GET
YOURS CHECKED!
FREE TO ALL.

LUNCH & LEARN

WITH VIA HEALTH

TOPIC:

HOSPICE 101

WEDNESDAY, OCTOBER 14TH AT 10 A.M.

BRING YOUR OWN LUNCH OR
LIGHT REFRESHMENTS WILL BE AVAILABLE.

REGISTRATION REQUESTED

Harvest Moon Wreath



Wednesday, October 14th
at 2 p.m.

FINAL CREATIONS WILL VARY. ALL SUPPLIES PROVIDED. REGISTRATION REQUIRED

Cards WITH ELSIE



Thursday, Ocotber 15th at 10 A.M.

SPACES ARE LIMITED. REGISTRATION REQUIRED.
ALL SUPPLIES PROVIDED. CRAFT NOT AS PICTURED.

JAVA FOR JOES

16 October at 0900

Enjoy a breakfast with current and former service members.

All ages, and branches, welcome.

The Burke County Veterans Services Officer will be available.

Free event. RSVP required.



MEGA JEOPARDY!

JOIN US FOR A LIVELY ROUND OF MEGA JEOPARDY, WHERE THE QUESTIONS ARE BIG, THE LAUGHS ARE BIGGER, AND EVERYONE HAS A CHANCE TO BE A TRIVIA CHAMPION!

FRIDAY, OCTOBER 16TH AT 2 P.M.

REGISTRATION REQUESTED.

8

DONUTS & DETECTIVES

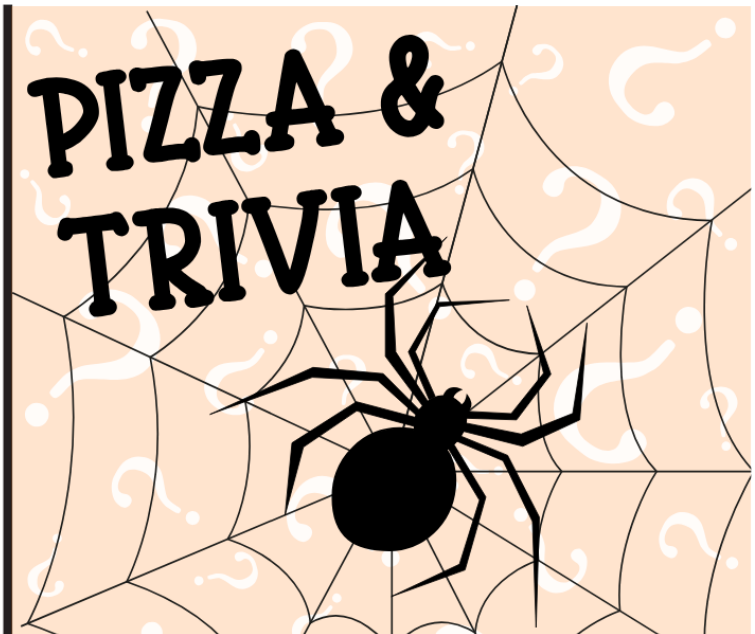
Put your detective skills to the test with brain teasers that will keep you on your toes!



MONDAY, OCTOBER 19TH AT 11 A.M.

REGISTRATION REQUESTED

PIZZA & TRIVIA



MONDAY, OCTOBER 19TH AT 3 P.M.

PREREGISTRATION REQUIRED. ALL SUPPLIES PROVIDED.

SIGN LANGUAGE



TUESDAY, OCT. 20TH AT 10:30 A.M.

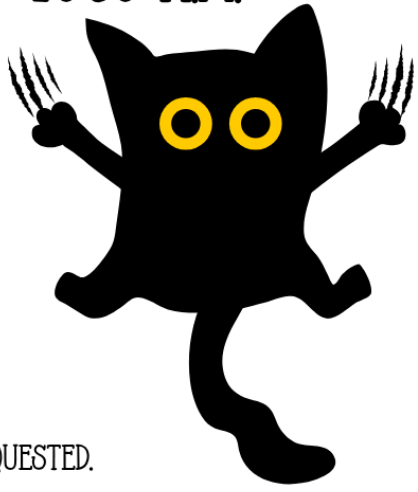
JOIN MATT FOR A CONTINUATION OF A BEGINNERS INTRODUCTION TO AMERICAN SIGN LANGUAGE.

REGISTRATION REQUESTED.

Kahoot!

MORNING COFFEE & SONG TRIVIA

WEDNESDAY, OCTOBER 21ST AT 10:30 A.M.



REGISTRATION IS REQUESTED.

COOKING WITH BAO

A TASTE OF LAOS: STICKY RICE SERVED WITH LAO SAUSAGE AND LAO STEAK SALAD

WEDNESDAY, OCTOBER 21ST AT 2 P.M.

COOKING WITH TERA

PEANUT BUTTER MUDDY BUDDIES

TUESDAY, OCTOBER 27TH AT 11 A.M.

SPACE IS LIMITED - REGISTRATION REQUIRED FOR EACH CLASS. ALL SUPPLIES PROVIDED.

BOUND BY BOOKS BOOK CLUB

THURSDAY, OCTOBER 22ND AT 11 A.M.



Ghost Frame



FRIDAY, OCTOBER 23RD AT 10:30 A.M.

SPACES ARE LIMITED. REGISTRATION REQUIRED. ALL SUPPLIES PROVIDED. CRAFT NOT AS PICTURED.

Seniors Night Out

Bones Jones

LAKE JAMES, NC

3221 NC-126, MORGANTON, NC 28655-6016

FRIDAY, OCTOBER 23RD AT 4:30 P.M.

ATTENDEES ARE RESPONSIBLE FOR THEIR OWN TRANSPORTATION AND FOOD COSTS.

LUNCH & LEARN

With Partners

Wednesday, October 28th
at 12 p.m.

Topic:

Types of Dementia

Bring your own lunch or
light refreshments will be available.

Registration Requested

Pumpkin Decorating

Wednesday, October 28th at 2 p.m.



SPACES ARE LIMITED. REGISTRATION REQUIRED.
ALL SUPPLIES PROVIDED. CRAFT NOT AS PICTURED.

WEREWOLVES GAME





WEREWOLVES OF MILLER'S HOLLOW IS A GAME THAT TAKES PLACE IN A SMALL VILLAGE WHICH IS HAUNTED BY WEREWOLVES. EACH PLAYER IS SECRETLY ASSIGNED A ROLE AND MUST SAVE THE TOWN BY FINDING OUT THE WEREWOLVES.

THURSDAY, OCTOBER 29TH AT 10 A.M.

REGISTRATION REQUESTED

HALLOWEEN PARTY

FRIDAY, OCTOBER 30TH
AT 1 P.M.

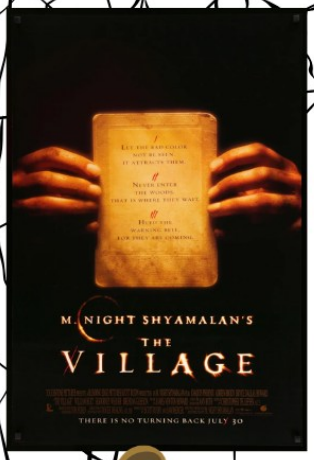
JOIN US FOR FUN GAMES, TRIVIA, & SNACKS!





REGISTRATION REQUESTED

Monday Movies



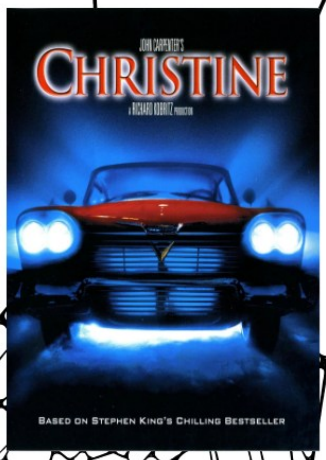
THE VILLAGE
PG-13 - OCT 5TH



INTERVIEW WITH
A VAMPIRE
R - OCT 12TH



STONEHURST ASYLUM
PG-13 - OCT 19TH



CHRISTINE
R - OCT 26TH



POPCORN SERVED.
REGISTRATION REQUESTED.

HALLOWEEN TRIVIA

THE FIRST JACK-O-LANTERNS WERE MADE OUT OF WHAT?
A. WATERMELON
B. CANTALOPE
C. TURNIPS
D. PUMPKINS

ACCORDING TO SUPERSTITION, IF YOU STARE INTO A MIRROR AT MIDNIGHT ON HALLOWEEN, WHO WOULD YOU SEE?
A. BLOODY MARY
B. YOUR FUTURE SPOUSE
C. YOUR DEATH
D. DEAD ANCESTORS

WHERE DID HALLOWEEN ORIGINATE?
A. ENGLAND
B. AMERICA
C. SCOTLAND
D. IRELAND

WHAT IS THE TOP-SELLING CANDY FOR HALLOWEEN?
A. SNICKERS
B. CANDY CORN
C. M&MS
D. REESE'S



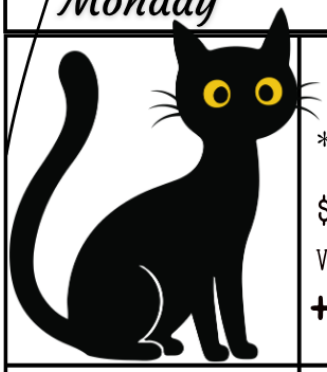
HOW MANY "WITCHES" WERE BURNED AT THE STAKE IN THE SALEM WITCH TRIALS?
A. 13
B. 20
C. 22
D. NONE

THE AVERAGE AMERICAN HOUSEHOLD SPENDS HOW MUCH ON HALLOWEEN CANDY ANNUALLY?
A. $28
B. 35
C. $44
D. $52

WHAT WAS THE FIRST WRAPPED PENNY CANDY IN AMERICA?
A. NECCO WAFERS
B. TOOTSIE ROLLS
C. SWEETHEARTS
D. HERSHEY'S KISSES

WHAT DOES THE ENGLISH WORD "HALLOW" MEAN?
A. SIN
B. SPIRIT
C. SAINT
D. SPOOK

October 2026

Monday	Tuesday	Wednesday	Thursday	Friday
	**ICON KEY** *= REQUIRES PRE-REGISTRATION $= FEE V = VIRTUAL ONLY + = VIRTUAL & IN PERSON		1 8:30A SIGN UPS BEGIN 10:30A TECH CLASS WITH SHELLY*	2 11A DIGITAL COUPONING*
5 10:30A WITCH-CRAFT* 1P POTTERY* 2P MOVIE MATINEE	6 10:30A SEWING CRAFT* 2P LINE DANCING CLASS*$	7 10:30A BINGO WITH THE GREENS* 2P HALLOWEEN WOOD PUMPKIN CRAFT*	8 10:30A HALLOWEEN SIGN* 2P AIRFRYING 101*	9 9A VETERANS SERVICES OFFICER AVAILABLE 10:30A COFFEE SOCIAL* 11:30A LUNCH & LEARN WITH UNC HEALTH* 2P COOKING CLASS WITH COOPERATIVE EXTENSION* 2P LRC DICE GAME*
12 11A RESISTANCE BAND STRETCHES* 2P MOVIE MATINEE	13 10:30A PUMPKIN DOOR HANGER* 2P LINE DANCING CLASS*$	14 8:30A BLOOD PRESSURE CHECKS 10A HOSPICE 101* 2P HARVEST MOON WREATH*	15 EARLY VOTING 10A CARDS WITH ELSIE* 2:30P BINGO WITH GRACE HEIGHTS*	16 EARLY VOTING 9A JAVA FOR JOES* 10:30A MINI CAULDRONS* 2P MEGA JEOPARDY*
19 EARLY VOTING 11A DOUNTS & DETECTIVES* 2P MOVIE MATINEE 3P PIZZA & TRIVIA*	20 EARLY VOTING 10:30A SIGN LANGUAGE WITH MATT* 2P LINE DANCING CLASS*$	21 EARLY VOTING 10:30A MORNING COFFEE & KAHOOT TRIVIA* 2P GLOBAL COOKING WITH BAO*	22 EARLY VOTING 11A BOOK CLUB* 2P BINGO WITH HOPSCOTCH*	23 EARLY VOTING 10:30A GHOST FRAME CRAFT* 2P LRC DICE GAME* 4:30P SENIORS NIGHT OUT*
26 EARLY VOTING 11A RESISTANCE BAND STRETCHES* 2P MOVIE MATINEE	27 EARLY VOTING 11A COOKING WITH TERA* 2P LINE DANCING CLASS*$	28 EARLY VOTING 8:30A BLOOD PRESSURE CHECKS 10A POTTERY* 12P LUNCH & LEARN WITH PARTNERS* 2P PUMPKIN DECORATING CONTEST*	29 EARLY VOTING 10A WEREWOLVES GAME*	30 EARLY VOTING 1P HALLOWEEN PARTY 13

UPDATED MEDICARE COSTS FOR 2026

Part A Deductible	$1,736.00
Part B Premium	$202.90
Part B Deductible	$283.00
Part D Cap of Out-of-Pocket Costs for Rx	$2,100.00

EXTRA HELP PROGRAM
FOR COSTS OF PRESCRIPTION DRUG PLANS

WITH EXTRA HELP, YOU SAVE ON PREMIUM COSTS, CO-PAYS, DEDUCTIBLES, AND YOU MAY AVOID A COVERAGE GAP. WE CAN ASSIST WITH APPLICATIONS. PLEASE CALL 764-9300 FOR AN APPOINTMENT.

QUALIFYING INCOME LIMITS:

INDIVIDUAL - $1,956 AND COUPLE $2,644

ASSET LIMITS:

INDIVIDUAL $17,600 AND COUPLE $35,130

(CASH, INVESTMENTS - DO NOT COUNT YOUR HOME)



Breast Cancer is a reality for many women. This October, let's raise awareness, promote early detection, and support those affected. If you're on Medicare, take advantage of the covered preventive services, including mammograms.

MEDICARE APPOINTMENTS ARE FULL

BUT THERE ARE OPTIONS FOR ASSISTANCE...

LEARN HOW TO USE MEDICARE.GOV!

JOIN US ON OCTOBER 13TH AT 1:00 P.M. FOR A HELPFUL PROGRAM ON "HOW TO USE MEDICARE.GOV." LEARN HOW TO NAVIGATE THE WEBSITE, COMPARE MEDICARE PLANS, AND FIND THE INFORMATION YOU NEED TO MAKE INFORMED CHOICES ABOUT YOUR COVERAGE. PLEASE RSVP AT (828) 764-9390 TO REGISTER.

CALL AFTER OCTOBER 15TH

NUMBERS TO CALL FOR ASSISTANCE:

NORTH CAROLINA SHIIP HOTLINE IN RALEIGH 855-408-1212

MEDICARE NATIONAL HOTLINE 800-633-4227

WHEN CALLING THESE NUMBERS, HAVE YOUR MEDICARE CARD AND YOUR LIST OF MEDICATIONS READY. THEY WILL NEED THAT INFO!

14

INFORMATION & RESOURCES

AARP

Provides free Workshops, Events & Seminars. This is a great location for online learning and life skills for people over 50.

Topics include: Caregiving webinars and workshops on Housing, Work and Jobs. So many topics to choose from!

Visit https://learn.aarp.org for a list of upcoming courses.

TRANSPORTATION

Greenway Public Transportation provides general & Medicaid transports.
828-464-9444

Catawba Valley Medical Services in Morganton receives a grant to provide free medical transportation.
828-437-8808

NC 211

NC 211 is an information and referral service provided by United Way of NC. Families and individuals can dial 2-1-1 or 888-892-1162 to obtain free and confidential information on health and human services and resources within their community. You can also visit www.nc211.org for online assistance.

alzheimer's association

The Alzheimer's Association 24/7 Helpline (800)272-3900 is available around the clock, 365 days a year.

Through this free service, specialists & master's level clinicians offer confidential support and information to people living with dementia, caregivers, families & the public.

NC BAM

If you are 65 or older and feel isolated or lonely, the North Carolina Baptist Aging Ministry wants to help!

A friendly voice is available. Monday through Friday from 9am to 9pm.
1-866-578-4673

PACT: PARTNERING ADULT CAREGIVERS TOGETHER

This is a free support group for caregivers to meet with others, to share experiences, learn new skills, and get answers to questions. The group is open, friendly and informal. There will be a light meal with the meeting. Reservations are requested to attend by calling.
(828)764-9390

FOOD PANTRIES

If you are in need of food, below are a few options. Contact the senior center for a full list of pantries in the county.

Burke United Christian Ministries:
828-433-8075

The Outreach Center:
828-439-8300

East Burke Christian Ministries:
828-397-7074

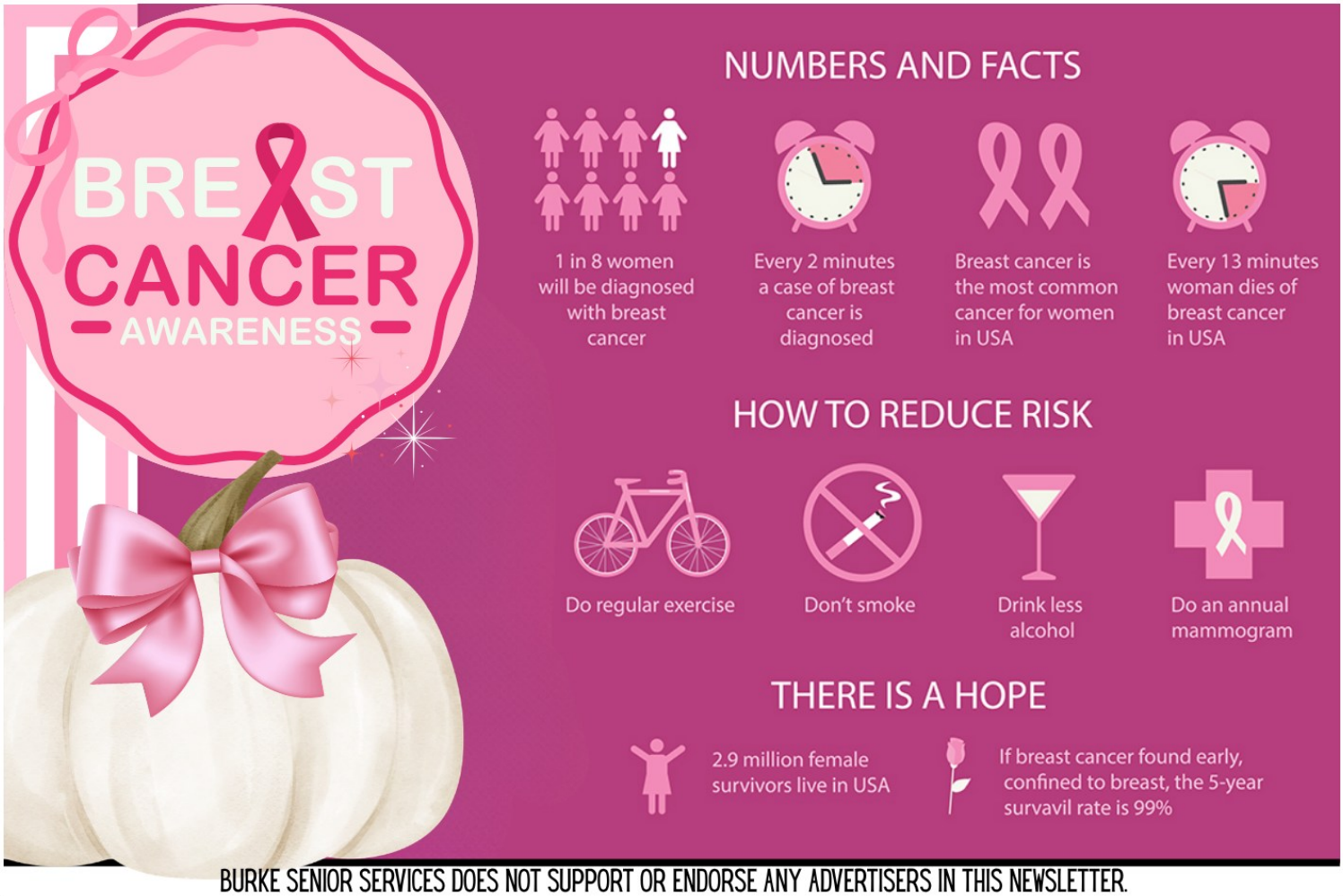
Hildebran United Methodist Church:
828-308-8106

Transformation Church:
828-322-1621



AREA RESOURCES & PROGRAMS

AARP - Host the East Burke AARP at East Burke Senior Center, Host the Table Rock AARP (all hearing impaired) at the Burke Senior Center, work with the Burke County AARP.
Adult Day Health - Assist with enrollment to local Adult Day Health program.
Host the **Burke County Council on Aging**.
Disaster Preparedness - Information available to assist you in preparation and readiness should a disaster occur.
Durable Medical Equipment - Seniors can borrow, free of charge, various home health equipment including wheel-chairs, bathroom chairs and other common pieces of equipment (subject to availability) at both Senior Centers.
Elder Abuse / Adult Protective Services - Reporting assistance provided onsite when needed.
Energy Assistance - Centers serve as FAN distribution site. LIEAP & CRISIS Intervention assistance available on site.
Food Distribution - Referrals to local food banks available including BUCM, EBCM, The Outreach Center, & others.
Provide Various **Health Screenings and Health Promotion** programs geared towards the older adult free of charge or at reasonable cost.
Home Delivered and Congregate Meals are available through Burke County Nutrition Program. Also serve as a **Meals on Wheels** delivery location. Volunteers needed.
Home Health & In-Home Aide Services - Assistance completing and sending in intake forms for grant funded services; Referrals to local agencies providing home health services in your home.
Home Improvement - Assist clients with home improvement through various agencies including Foothills Service Project and Carolina Cross Connection.
Hospice - Host presentations annually on Hospice Care. Assistance for referrals for care.
Housing - Assist in finding & contacting local housing options. Application completion assistance is available.
Job Training & Job Placement - Senior Center serves as SCSEP host. Provide assistance with online job applications including NCWorks.
Legal Services - Available through Legal Aid of North Carolina. All services are by appointment only. Notary available onsite to assist with Power of Attorney, Health Care POA and Living Wills.
Long Term Care Facilities/Ombudsman Program - Maintain list of facilities for long term care placement. Connect to the regional Ombudsman residents' right advocate. Community Advisory Committee Volunteers needed to visit residents in local long term care facilities.
Medicaid - Assist in completion of Medicaid application online or paper format, including Medicare Savings Program.
Mental Health - Educational programs provided onsite. Assistance and Referral to mental health support programs available.
Outreach - Staff available to present at your church or other civic gatherings and health fairs.
Rehabilitation Services - Assistance available to connect with area agencies providing rehab services including vocational rehab, independent living and long term care rehab.
Respite - Assistance to connect you to the Family Caregiver Support Program respite services & Project CARE.
Reverse Mortgage Counseling - Staff can give general information and help locate an agency.
SHIIP (Senior Health Insurance Information Program) - Provide counseling services for older adult and qualified Medicare recipients interested in Medicare, supplemental insurance, and long-term care insurance information. Also assist with signing up for Medicare Parts A, B, & D.
Senior Games - Applications available onsite & assistance provided for completion, submission & Silver Arts transportation.
Social Security - Assist in filling out the online applications for initial enrollment and other basic services.
Support Groups - PACT (Partnering Adult Caregivers Together) offered the third Monday each month at the Burke Senior Center, Vietnam Combat Support Group, WWII/Korean Support Group, Java for Joes at the East Burke Senior Center also available. Call for a full listing of available support groups.
TAB - Telephone Assurance program of Burke - Daily calls to seniors to check on well-being and safety.
Tax Aide - Tax Assistance referrals for the elderly.
Transportation - Assist clients in meeting their transportation needs, including Senior Carpooling, General and Medical Transportation.



BURKE SENIOR SERVICES DOES NOT SUPPORT OR ENDORSE ANY ADVERTISERS IN THIS NEWSLETTER.

BURKE COUNTY Senior Services

SENIOR CENTER OF Excellence CERTIFIED BY NCDHHS Division of Aging

EAST BURKE SENIOR CENTER

101-A Main Avenue West - Hildebran, NC 28637
Telephone: (828)764-9300
Fax: (828)764-9305

HOURS OF OPERATION

Monday 8:00 am - 7:00 pm
Tuesday - Friday 8:00 am - 5:00 pm

EBSC CENTER STAFF

Assistant Director:
Rebecah Bova

Program Assistants:
Tera Bridges
Bao Yang

OUR MISSION:

The Mission of the East Burke Senior Center is to sustain and improve the quality of life, promote independence while preserving the dignity of and to enhance access to services and information for senior adults and mature adults with disabilities and their caregivers.

FOLLOW US
@ EASTBURKESENIORCENTER

BURKE COUNTY
ANIMAL RESOURCE CENTER

DIRECTOR'S REPORT

July - September 2026

Prepared for the Animal Services Advisory Board

REPORT FOCUS | OPTIMIZING SYSTEMS • CONSISTENT PRACTICE • MEASURING IMPACT

Improving Lives

Executive Overview

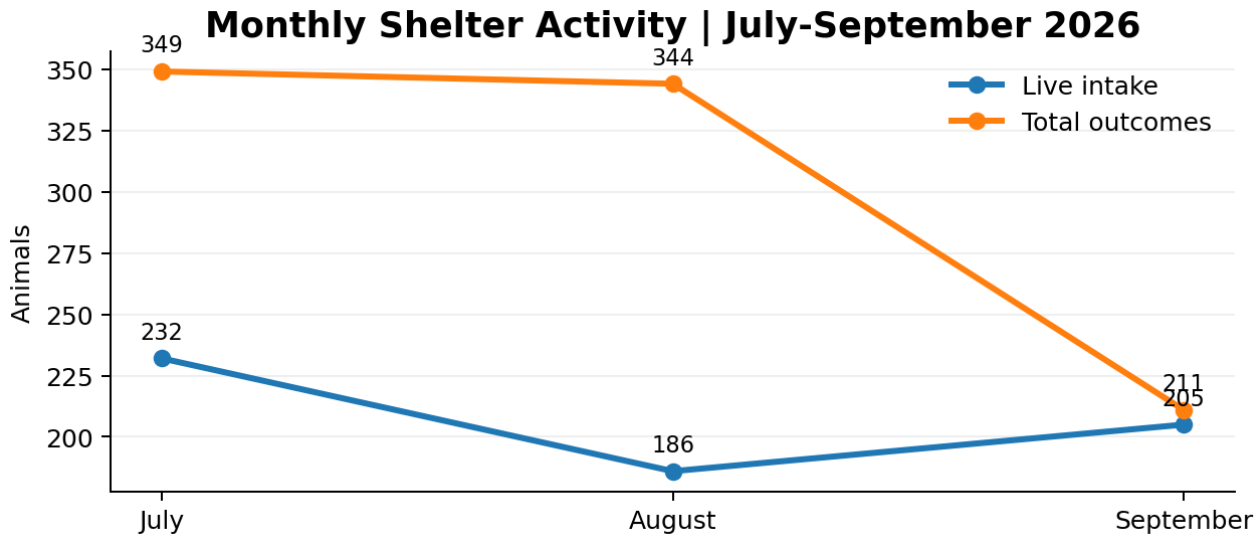
August and September focused on optimizing the systems that support daily service delivery across BCARC. Work centered on improving data quality, refining automated workflows, strengthening Animal Control case management, standardizing staff processes, and continuing to build community-facing services that help resolve needs efficiently.

The department's KPI framework is established and actively being tracked. Current work is focused on the data-entry and automation processes behind those measures so reporting remains accurate, consistent, and sustainable. The November Advisory Board retreat will provide the deeper review of trends, benchmarks, targets, and strategic priorities.

August-September Snapshot

391	555	450	160
Live Intakes	**Total Outcomes**	**Adoptions**	**Sept. Ending Count**
228 cats | 163 dogs	330 cats | 225 dogs	288 cats | 162 dogs	86 cats | 74 dogs

Source: monthly Shelter Animals Count reports. July reports are included in the appendix for month-to-month context.



1 | Data, Automation & Performance Management

- KPI measures are established and being tracked across Animal Welfare, Public Health & Safety, and Community Engagement.
- Current refinement is focused on the data-entry processes feeding those measures: reducing duplicate entry, correcting mappings, improving staff consistency, and validating automated totals.
- SharePoint, Microsoft Forms, Power Automate, Shelterluv reporting, and Power BI are being used together to reduce manual work and create a more reliable operational picture.
- Monthly Shelter Animals Count reports are now provided by species and month so the Advisory Board can review the underlying intake, outcome, and population data in a consistent format.

2 | Animal Control & Public Health

- The new Animal Control complaint system is moving into routine use, creating a consistent workflow from citizen submission through officer follow-up and case closure.

- Automations support complaint logging, resource delivery, expected timelines, follow-up reminders, and re-notification when citizens respond.
- Post-case closure surveying is being incorporated to help evaluate whether services resolved the citizen's concern and where processes can improve.
- Phone-demand review continues to inform where online reporting, automated resources, and self-service options can reduce pressure on live phone coverage.
- Rabies record and certificate workflows continue to be standardized to improve documentation, retrieval, and reporting.

3 | Animal Welfare, Adoption & Veterinary Services

- Veterinary workflows continue to be refined around scheduling, documentation, treatment, surgery, and movement through care.
- Population-management review remains focused on time to surgery, length of stay, foster placement, return-to-owner opportunities, and identifying animals that need earlier intervention.
- The Adoption SOP is included as a Board resource. It formalizes BCARC's conversation-based, guidance-focused adoption process and emphasizes education, appropriate matching, consistent documentation, and reducing unnecessary barriers.
- The SOP also establishes first-come, first-served adoption, required documentation, objective criteria for denial, foster-to-adopt procedures, and escalation of complex situations to leadership.

4 | Community Services & Engagement

- Pet Food Pantry, surrender-diversion, access-to-care, and resource-based interventions continue to support problem-solving before shelter admission becomes necessary.
- Volunteer programming is being organized into progressive pathways including animal handling, outings, community-cat support, medical opportunities, and outreach.
- Junior Academy and school/student partnership opportunities continue to be developed to expand structured community participation.
- Grant and partnership development remains focused on preventative services and expanded access to veterinary care.

Looking Ahead | October-November

Data Quality	Continue refining staff data-entry workflows and validating automated KPI feeds.
Animal Control	Continue implementation and refinement of the complaint/case-management system.
Standardization	Reinforce consistent SOP use and documentation across adoption, field, shelter, and clinic workflows.
Board Retreat	Prepare the deeper KPI, trend, benchmark, and strategic-priority review for November.

BOARD RESOURCE APPENDIX

Monthly Shelter Animals Count reports and Adoption SOP

The following source reports are reproduced as provided so Board members can review each month and species separately. July is included for month-to-month context; the Director's narrative reporting period remains August-September.

A	July 2026 - Felines and Canines
B	August 2026 - Felines and Canines
C	September 2026 - Felines and Canines
D	Standard Operational Procedures: Animal Adoption

APPENDIX A | JULY 2026

Shelter Animals Count (SAC)

Run by bcnc_ksettlemyre on 10/13/2026 | 11:11 AM

Selected Date Range: 07/01/2026 to 07/31/2026

Felines

		In Shelter	In Foster Care	Total
Beginning Animal Count on 07/01/2026		**47**	**189**	**236**
Live Intake	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Stray/At Large	10	48	0	58
Relinquished by Owner	41	80	0	121
Transfer in from agency (in state)	0	0	0	0
Transfer in from agency (out of state)	0	0	0	0
Transfer in from agency (international)	0	0	0	0
Owner Intended Euthanasia	0	0	0	0
Impound/Seizure	0	0	0	0
Other Intakes	2	1	0	3
TOTAL LIVE INTAKE	**53**	**129**	**0**	**182**

APPENDIX A | JULY 2026

Felines | Shelter Animals Count | Page 2 of 3

Live Outcomes	Adult	Up to 5 Months	Age Unknown	Total
Adoption	68	133	0	201
Returned to Owner	0	3	0	3
Transfer out to agency (in state)	0	0	0	0
Transfer out to agency (out of state)	0	0	0	0
Transfer out to agency (international)	0	0	0	0
Returned to Field	0	0	0	0
Other Live Outcome	0	0	0	0
SUBTOTAL: LIVE OUTCOMES	**68**	**136**	**0**	**204**
Other Outcomes	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Died in care	1	20	0	21
Lost in care	0	0	0	0
Shelter Euthanasia	5	12	0	17
Owner Intended Euthanasia	0	0	0	0
SUBTOTAL: OTHER OUTCOMES	**6**	**32**	**0**	**38**
TOTAL OUTCOMES	**74**	**168**	**0**	**242**

APPENDIX A | JULY 2026

Felines | Shelter Animals Count | Page 3 of 3

	In Shelter	In Foster Care	Total
Ending Animal Count on 07/31/2026	78	108	186

SHELTERLUV

APPENDIX A | JULY 2026

Shelter Animals Count (SAC)

Run by bcnc_ksettlemyre on 10/13/2026 | 11:11 AM

Selected Date Range: 07/01/2026 to 07/31/2026

Canines

		In Shelter	In Foster Care	Total
Beginning Animal Count on 07/01/2026		**63**	**106**	**169**
Live Intake	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Stray/At Large	12	7	0	19
Relinquished by Owner	11	11	0	22
Transfer in from agency (in state)	0	0	0	0
Transfer in from agency (out of state)	0	0	0	0
Transfer in from agency (international)	0	0	0	0
Owner Intended Euthanasia	0	0	0	0
Impound/Seizure	0	0	0	0
Other Intakes	9	0	0	9
TOTAL LIVE INTAKE	**32**	**18**	**0**	**50**

APPENDIX A | JULY 2026

Canines | Shelter Animals Count | Page 2 of 3

Live Outcomes	Adult	Up to 5 Months	Age Unknown	Total
Adoption	66	25	0	91
Returned to Owner	6	0	0	6
Transfer out to agency (in state)	0	0	0	0
Transfer out to agency (out of state)	0	0	0	0
Transfer out to agency (international)	0	0	0	0
Returned to Field	0	0	0	0
Other Live Outcome	0	0	0	0
SUBTOTAL: LIVE OUTCOMES	**72**	**25**	**0**	**97**
Other Outcomes	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Died in care	0	0	0	0
Lost in care	0	0	0	0
Shelter Euthanasia	6	4	0	10
Owner Intended Euthanasia	0	0	0	0
SUBTOTAL: OTHER OUTCOMES	**6**	**4**	**0**	**10**
TOTAL OUTCOMES	**78**	**29**	**0**	**107**

APPENDIX A | JULY 2026

Canines | Shelter Animals Count | Page 3 of 3

	In Shelter	In Foster Care	Total
Ending Animal Count on 07/31/2026	56	62	118

SHELTERLUV

APPENDIX B | AUGUST 2026

Shelter Animals Count (SAC)

Run by bcnc_ksettlemyre on 10/13/2026 | 11:13 AM

Selected Date Range: 08/01/2026 to 08/31/2026

Felines

		In Shelter	In Foster Care	Total
Beginning Animal Count on 08/01/2026		**78**	**108**	**186**
Live Intake	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Stray/At Large	5	44	0	49
Relinquished by Owner	37	32	0	69
Transfer in from agency (in state)	0	0	0	0
Transfer in from agency (out of state)	0	0	0	0
Transfer in from agency (international)	0	0	0	0
Owner Intended Euthanasia	0	0	0	0
Impound/Seizure	0	0	0	0
Other Intakes	3	1	0	4
TOTAL LIVE INTAKE	**45**	**77**	**0**	**122**

APPENDIX B | AUGUST 2026

Felines | Shelter Animals Count | Page 2 of 3

Live Outcomes	Adult	Up to 5 Months	Age Unknown	Total
Adoption	77	103	0	180
Returned to Owner	1	0	0	1
Transfer out to agency (in state)	0	0	0	0
Transfer out to agency (out of state)	0	0	0	0
Transfer out to agency (international)	0	0	0	0
Returned to Field	0	0	0	0
Other Live Outcome	0	0	0	0
SUBTOTAL: LIVE OUTCOMES	**78**	**103**	**0**	**181**
Other Outcomes	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Died in care	1	8	0	9
Lost in care	0	0	0	0
Shelter Euthanasia	7	12	0	19
Owner Intended Euthanasia	0	0	0	0
SUBTOTAL: OTHER OUTCOMES	**8**	**20**	**0**	**28**
TOTAL OUTCOMES	**86**	**123**	**0**	**209**

APPENDIX B | AUGUST 2026

Felines | Shelter Animals Count | Page 3 of 3

	In Shelter	In Foster Care	Total
Ending Animal Count on 08/31/2026	49	52	101

SHELTERLUV

APPENDIX B | AUGUST 2026

Shelter Animals Count (SAC)

Run by bcnc_ksettlemyre on 10/13/2026 | 11:13 AM

Selected Date Range: 08/01/2026 to 08/31/2026

Canines

		In Shelter	In Foster Care	Total
Beginning Animal Count on 08/01/2026		**56**	**62**	**118**
Live Intake	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Stray/At Large	10	6	0	16
Relinquished by Owner	16	22	0	38
Transfer in from agency (in state)	0	0	0	0
Transfer in from agency (out of state)	0	0	0	0
Transfer in from agency (international)	0	0	0	0
Owner Intended Euthanasia	0	0	0	0
Impound/Seizure	0	0	0	0
Other Intakes	8	2	0	10
TOTAL LIVE INTAKE	**34**	**30**	**0**	**64**

APPENDIX B | AUGUST 2026

Canines | Shelter Animals Count | Page 2 of 3

Live Outcomes	Adult	Up to 5 Months	Age Unknown	Total
Adoption	66	31	0	97
Returned to Owner	10	0	0	10
Transfer out to agency (in state)	0	0	0	0
Transfer out to agency (out of state)	0	0	0	0
Transfer out to agency (international)	0	0	0	0
Returned to Field	0	0	0	0
Other Live Outcome	17	0	0	17
SUBTOTAL: LIVE OUTCOMES	**93**	**31**	**0**	**124**
Other Outcomes	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Died in care	0	0	0	0
Lost in care	0	0	0	0
Shelter Euthanasia	10	1	0	11
Owner Intended Euthanasia	0	0	0	0
SUBTOTAL: OTHER OUTCOMES	**10**	**1**	**0**	**11**
TOTAL OUTCOMES	**103**	**32**	**0**	**135**

APPENDIX B | AUGUST 2026

Canines | Shelter Animals Count | Page 3 of 3

	In Shelter	In Foster Care	Total
Ending Animal Count on 08/31/2026	50	17	67

SHELTERLUV

APPENDIX C | SEPTEMBER 2026

Shelter Animals Count (SAC)

Run by bcnc_ksettlemyre on 10/13/2026 | 11:14 AM

Selected Date Range: 09/01/2026 to 09/30/2026

Felines

		In Shelter	In Foster Care	Total
Beginning Animal Count on 09/01/2026		**49**	**52**	**101**
Live Intake	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Stray/At Large	4	17	0	21
Relinquished by Owner	56	23	0	79
Transfer in from agency (in state)	0	0	0	0
Transfer in from agency (out of state)	0	0	0	0
Transfer in from agency (international)	0	0	0	0
Owner Intended Euthanasia	0	0	0	0
Impound/Seizure	0	0	0	0
Other Intakes	4	2	0	6
TOTAL LIVE INTAKE	**64**	**42**	**0**	**106**

APPENDIX C | SEPTEMBER 2026

Felines | Shelter Animals Count | Page 2 of 3

Live Outcomes	Adult	Up to 5 Months	Age Unknown	Total
Adoption	53	55	0	108
Returned to Owner	2	2	0	4
Transfer out to agency (in state)	0	0	0	0
Transfer out to agency (out of state)	0	0	0	0
Transfer out to agency (international)	0	0	0	0
Returned to Field	0	0	0	0
Other Live Outcome	0	0	0	0
SUBTOTAL: LIVE OUTCOMES	**55**	**57**	**0**	**112**
Other Outcomes	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Died in care	1	5	0	6
Lost in care	0	0	0	0
Shelter Euthanasia	0	3	0	3
Owner Intended Euthanasia	0	0	0	0
SUBTOTAL: OTHER OUTCOMES	**1**	**8**	**0**	**9**
TOTAL OUTCOMES	**56**	**65**	**0**	**121**

APPENDIX C | SEPTEMBER 2026

Felines | Shelter Animals Count | Page 3 of 3

	In Shelter	In Foster Care	Total
Ending Animal Count on 09/30/2026	41	45	86

SHELTERLUV

APPENDIX C | SEPTEMBER 2026

Shelter Animals Count (SAC)

Run by bcnc_ksettlemyre on 10/13/2026 | 11:14 AM

Selected Date Range: 09/01/2026 to 09/30/2026

Canines

		In Shelter	In Foster Care	Total
Beginning Animal Count on 09/01/2026		**50**	**17**	**67**
Live Intake	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Stray/At Large	25	16	0	41
Relinquished by Owner	15	32	0	47
Transfer in from agency (in state)	0	0	0	0
Transfer in from agency (out of state)	0	0	0	0
Transfer in from agency (international)	0	0	0	0
Owner Intended Euthanasia	0	0	0	0
Impound/Seizure	0	0	0	0
Other Intakes	11	0	0	11
TOTAL LIVE INTAKE	**51**	**48**	**0**	**99**

APPENDIX C | SEPTEMBER 2026

Canines | Shelter Animals Count | Page 2 of 3

Live Outcomes	Adult	Up to 5 Months	Age Unknown	Total
Adoption	32	33	0	65
Returned to Owner	10	0	0	10
Transfer out to agency (in state)	0	1	0	1
Transfer out to agency (out of state)	0	0	0	0
Transfer out to agency (international)	0	0	0	0
Returned to Field	0	0	0	0
Other Live Outcome	0	0	0	0
SUBTOTAL: LIVE OUTCOMES	**42**	**34**	**0**	**76**
Other Outcomes	**Adult**	**Up to 5 Months**	**Age Unknown**	**Total**
Died in care	1	3	0	4
Lost in care	0	0	0	0
Shelter Euthanasia	9	1	0	10
Owner Intended Euthanasia	0	0	0	0
SUBTOTAL: OTHER OUTCOMES	**10**	**4**	**0**	**14**
TOTAL OUTCOMES	**52**	**38**	**0**	**90**

APPENDIX C | SEPTEMBER 2026

Canines | Shelter Animals Count | Page 3 of 3

	In Shelter	In Foster Care	Total
Ending Animal Count on 09/30/2026	45	29	74

SHELTERLUV

APPENDIX D | ADOPTION SOP

Burke County Animal Services
636 Kirksey Drive Morganton, NC 28655
Website: https://www.burkenc.org/2444/Animal-Services
Phone: (828) 764-9588
Email: animalservices@burkenc.org

Standard Operational Procedures: Animal Adoption

Adoption
Adoptions are conducted on a first-come, first-served basis following the completion of required holding periods, in accordance with North Carolina Department of Agriculture regulations (02 NCAC 52J).
Burke County Animal Services utilizes a conversation-based adoption process rather than a traditional written application. This approach reduces barriers to adoption while allowing staff to educate adopters and guide appropriate matches between people and pets.
The goal of the adoption process is to:

- Match animals with appropriate homes
- Provide education and resources to adopters
- Increase successful, long-term placements
- Reduce unnecessary barriers that delay or prevent adoption

Adoption Process & Philosophy

- Adoptions are not approval-based, but rather guidance-based
- Staff will engage adopters in a conversation to assess lifestyle, expectations, and needs
- Staff should aim to recommend animals that are a good fit, not restrict access unnecessarily
- If a person is seeking to adopt, it is our responsibility to educate and support them, as they are likely to obtain an animal elsewhere if denied

Spay/Neuter Requirement (52J Compliance)
Animals must be spayed or neutered prior to adoption, unless otherwise permitted under North Carolina law or approved by the Director or designee.

No Holds Policy
Animals are not held for potential adopters and remain available on a first-come, first-served basis.
Exceptions may be made at the discretion of the Director or designee in limited circumstances.

Required Documentation (52J & 19A Compliance)
In accordance with state requirements, the following must be collected and documented for all adoptions:

- Full Name
- Physical Address
- Phone Number
- Government-issued ID (type and issuing state must be recorded; example: NCDL)
- Adoption Contract (signed and dated)

Email addresses should be requested but are not required.
All records must be accurate, complete, and maintained in accordance with state recordkeeping requirements.

Criteria for Denial of Adoption
While adoptions are not approval-based, Burke County Animal Services reserves the right to deny an adoption when there are documented concerns regarding animal welfare or safety, including but not limited to:

- Verified history of animal abuse or neglect
- Repeated pattern of returns or unsuccessful placements indicating inability to provide appropriate care
- Evidence of animal hoarding or unsafe living conditions

APPENDIX D | ADOPTION SOP

- Refusal to comply with basic care standards or legal requirements
- Situations where placing the animal would pose a direct risk to the animal's health or safety

Decisions must be:

- Fact-based and documented
- Made in alignment with the organization's mission and animal welfare standards
- Free from personal bias or subjective judgment

Non-Discrimination in Adoption Decisions

Individuals will not be denied adoption based on:

- Personality conflicts
- Staff perception not supported by evidence
- Minor disagreements or difficult interactions

A "Do Not Adopt" designation must be:

- Based on documented, legitimate concerns
- Approved by leadership
- Reviewed periodically for relevance

Adopters with Medical or Disease Concerns in the Home

When adopters disclose the presence of contagious disease or health risks in the home:

- Staff should provide education on disease transmission and risk
- Placement decisions should prioritize animal safety and public health
- In high-risk situations, staff may:
    - Recommend delaying adoption
    - Suggest alternative animals
    - Require clearance from a veterinarian if appropriate

These decisions must be reasonable, documented, and based on risk—not assumption.

Foster-to-Adopt Option

Due to delays in spay/neuter services, interested adopters may participate in a foster-to-adopt program.

- Animals remain property of the shelter until sterilization is complete
- Adopters must complete adoption within one business day following surgery
- Failure to complete adoption without communication may result in policy violations (see Ghosting Policy)

Customer Education & Support

Staff are expected to:

- Provide clear, consistent, and accurate information
- Offer resources to support successful pet ownership
- Encourage adopters to reach out for help rather than surrendering animals

Seeking help from the shelter is viewed as a positive and responsible action, not a negative indicator.

APPENDIX D | ADOPTION SOP

Best Practices (Internal Guidance)
To align with progressive sheltering and Fear Free principles:

- Focus on making good matches, not gatekeeping
- Use open-ended questions during conversations (not interrogations)
- Avoid creating unnecessary barriers to adoption
- Document concerns objectively and consistently
- When in doubt, support with education rather than deny
- Escalate complex situations to leadership rather than making unilateral decisions

Effective Date: 6/24/2024; Updated: 3/30/2026
Approved by: Kaitlin Settlemyre, Director

Burke County, North Carolina

Agenda Abstract
Meeting Date: October 19, 2026

VACANCY ANNOUNCEMENTS

Subject Title: **Clerk - Boards & Committees Vacancy Report**

Presented by: **Morgan Buchanan, Clerk to the Board**

Summary of Information:

Adult Care & Nursing Home Community Advisory Committee
Several vacancies exist. Initial terms of appointment are for one (1) year. Training is required and provided by the Western Piedmont Council of Governments through the Aging Support Program. Contact Michele Francois, LTC Regional Ombudsman, at 828.485.4271 or michele.francois@wpcog.org for more information.

Burke County Board of Adjustment
Applications are being accepted for Seat No. 1 – West Burke on the Burke County Board of Adjustment. The seven-member Board hears and decides appeals of Planning Administrator interpretations, Conditional Use Permit applications, and requests for variances from the Zoning Ordinance.
Members serve three-year terms and may serve no more than two consecutive terms. The Board meets on the second Tuesday of each month at 6:00 p.m.

Please contact the Clerk to the Board's Office at 828-764-9354 for more information or to apply.

Burke County Department of Social Services Advisory Board
Applications are being accepted for Seat No. 1-At Large and Seat No. 3- At Large for the Burke County DSS Advisory Board. The board serves for three-year terms with a two-term limit. The Burke County Department of Social Services Advisory Board serves as a connection between the Department of Social Services and the broader community. Appointed by the Burke County Board of Commissioners in accordance with North Carolina law, the Board promotes collaboration, strengthens community partnerships, and helps build awareness of the Department's programs and services. Board members serve as community ambassadors for the Department, helping connect DSS with local organizations, resources, and residents while supporting efforts to respond to the evolving needs of Burke County.

They also have other duties and responsibilities the Board of Commissioners may assign to it.

Burke County Parks & Recreation Commission
Applications are being accepted for Seat No. 3 – Drexel Elementary School District on the Burke County Parks & Recreation Commission. The 13-member Commission advises the Recreation Department and the Burke County Board of Commissioners on recreation policies, programs,

finances, and activities that support recreational opportunities for Burke County residents. Seat No. 3 represents the Drexel Elementary School District as one of the County's youth athletic playing districts. Members are appointed by the Board of Commissioners and serve three-year terms. The Commission meets on the second Tuesday of each month.

Please contact the Clerk to the Board's Office at 828-764-9354 for more information or to apply.

Burke County Public Health Advisory Board
Applications are being accepted for several seats on the Public Health Advisory Board, an 11-member board that advises the County Commissioners on public health matters in Burke County. Pharmacists, veterinarians, optometrists, restaurateurs and citizens are encouraged to apply. PHAB meetings are held on the 1st Wednesday of even numbered months at the Health Department at 5:00 p.m. The term is for three (3) years. Please contact the Health Director at 764-9160 or the Clerk at 764-9354 for more information or to apply.

Burke Senior Center Advisory Council
Applications are being accepted for several seats on the Advisory Council. The terms are for three years. Their purpose is to advise the Burke County Board of Commissioners regarding the operation of the Senior Center, and to make recommendations on programs and future growth. The objectives of the Advisory Council are:

- To determine the needs and/or desires, problems and potentials of older adults and adults with disabilities.
- To enhance community awareness regarding the Senior Centers and their functions.
- To identify resources and to assist in securing resources from the private and public sector.
- To serve in an advisory capacity to the Burke County Board of Commissioners.

Contact Roxanne Powell, Senior Services Director, at 828-764-9390 or by email at roxanne.powell@burkenc.org.

Dangerous Dog Appeal Board
Applications are being accepted for one (1) veterinarian seat on the Dangerous Dog Appeal Board, as required by the Burke County Code of Ordinances. The Board hears appeals related to dangerous dog determinations and related enforcement actions. Applicants should be licensed veterinarians with an interest in animal welfare and public safety. Terms are for three (3) years. Please contact the Clerk to the Board's Office at 828-764-9354 for more information or to apply.

Drexel Planning Board - ETJ Alternate
Applications are being accepted for an alternate seat on the Drexel Planning Board representing the ETJ (Extraterritorial Jurisdiction). Contact the Town of Drexel at 828-430-1794 for more information.

Hickory Regional Planning Commission
One (1) vacancy exists. Contact Brian M. Frazier, Director of Planning, City of Hickory, at 828-

323-7422 for more information.

Juvenile Crime Prevention Council
Applications are being accepted for two (2) Student Under 18 seats on the Burke County Juvenile Crime Prevention Council (JCPC). The Council works to identify the needs of at-risk youth in Burke County, support delinquency prevention efforts, and recommend programs and community-based resources that help young people avoid involvement in the juvenile justice system.
These seats provide an opportunity for young people to bring a student perspective to discussions about the needs, challenges, and resources available to youth in Burke County. Members are appointed by the Burke County Board of Commissioners and serve two-year terms.

Please contact the Clerk to the Board's Office at 828-764-9354 for more information or to apply.

Local Emergency Planning Committee (LEPC)
The Local Emergency Planning Committee (LEPC) is seeking applicants to fill Seat No. 11 (Media). LEPCs are established under the Emergency Planning and Community Right-to-Know Act (EPCRA) and North Carolina General Statute Chapter 166A to help communities prepare for and respond to hazardous materials emergencies. The LEPC works with local governments, emergency responders, and industry partners to develop and maintain emergency response plans, promote public access to information about hazardous chemicals, coordinate training and exercises, and support effective communication during incidents. This is an 18-member committee, with members appointed to 3-year terms. Individuals with experience in media, communications, journalism, or public information are encouraged to apply to fill this vacancy. Please contact Dominic Minor at dominic.minor@burkenc.org for more information.

Strategic Plan Focus Area Alignment:

No. 1- Community Advancement

To invest in cultural capital and advancement strategies that promote participative governance that elevates a community to live, work and play-while also positioning Burke County as a community of choice.

Budgetary Effect: Not Applicable

County Manager's Recommendation: Not Applicable

Legal Review:

Suggested Motion: No action needed, encourage citizens to apply and participate.