MINUTES
BURKE COUNTY BOARD OF COMMISSIONERS
BUDGET & STRATEGIC PLANNING WORK SESSION

The Burke County Board of Commissioners held a budget and strategic planning work session on Thursday, March 5, 2026, at 9:00 a.m. at the Helmick Seminar Room, 1001 Burkemont Avenue, Moore Hall, Room 315, Morganton, North Carolina. The meeting was recorded and uploaded to the County's YouTube channel, BurkeCountyNC. The agenda, in its entirety, was posted to the County's website, www.burkenc.org, the day before 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 Kay Draughn, Clerk to the Board Margaret Pierce, Finance Director/Deputy County Manager Various Department Heads and Staff
STAFF ABSENT:	Destin Hall, County Attorney (Excused)

CALL TO ORDER

Chairman Brittain called the meeting to order at 8:51 a.m. and requested that Brian Epley, County Manager, give a brief overview of the day's proceedings.

BUDGET RETREAT ITINERARY

Brian Epley, County Manager, briefly went over the items for discussion for the day, as outlined in the agenda.

INTRODUCTIONS

Chairman Brittain, noting that there was still some time before 9:00 a.m., requested a brief introduction of the people around the room.

APPROVAL OF AGENDA

Motion: To approve the agenda as presented.

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

PRESENTATIONS

CM - PUBLIC SAFETY STRATEGIC PLAN UPDATE

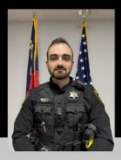
Brian Epley, County Manager, invited Sheriff Hinceman to present a public safety update. The highlights of which were as follows:

BURKE COUNTY SHERIFF'S OFFICE



Sheriff Banks Hinceman
County Commissioners
Presentation







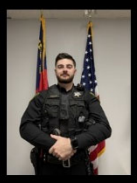
NEW HIRES

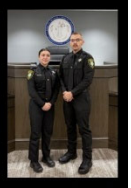
NOVEMBER 2022 – DECEMBER 2025

In November 2022, when Sheriff Hinceman took office, we had 16 Deputy Vacancies and 26 Detention Vacancies

- New Hires/Promotions
  - Sworn: 36
  - Detention: 31
- Separations:
  - Sworn: 16
  - Detention: 13
- Current Vacancies:
  - Sworn: 1
  - Detention: 7









103 Full-Time Sworn Positions

48 Full-Time Detention Positions

11 Full-Time Support Staff Positions



The Faces of Your Sheriff's Office

JOIN OUR TEAM!

The Burke County Sheriff's Office is a diverse agency, made up of staff from a wide range of ethnic and racial backgrounds. We are currently comprised of the following:

127 Caucasian Males
39 Caucasian Females
3 African American Females
2 African American Males
3 Hispanic Males
2 Hispanic Females
2 Asian Males

RECLASSIFICATION OF POSITIONS

- Reorganized staff by adding four shift Lieutenants, one Training Coordinator Lieutenant, one Assistant Jail Administrator and one Transport Officer by reallocating 12 vacant detention positions—expanding sworn staff without a significant increase in cost to taxpayers.

- Were also able to reclassify 10 positions to create an ICAC position, an Intelligence Officer position, 2 Deputies to each patrol day shift, 4 Deputies to each night shift patrol 2 special enforcement team positions.

OFFICE UPDATES

Burke County Sheriff's Office
Conference Room





OFFICE UPDATES

Burke County Sheriff's Office Evidence Room with sliding storage shelves



Commercial and High-Density Systems

For commercial, industrial or library applications, systems designed to maximize storage in a small footprint (high-density mobile shelving) involve a much greater investment due to their scale, load capacity and robust engineering.

- **High Density Mobile Shelving**
  - These large-scale systems, where shelving units move along floor tracks to create a single aisle needed, typically cost from $2,000 to over $9,000 for specific kits, depending on the length, height and number of units.
- Large-Scale Projects
  - Entire high-density mobile storage solutions for businesses or institutions often range from $75,000 to $150,000 or more, depending on the size of the space, capacity requirements and integration needs (such as software).

These types of shelving increase the capacity to store and maintain evidence in a building that was constructed in 1993. As crime increases, the volume of evidence that must be properly stored also rises. We would like to thank Burke County Maintenance for the installation of the shelving.

OVERDOSES

2021: 563 overdoses with 43 deaths

2022: 572 overdoses with 27 deaths
- Deputies administered 43 dosage units of Narcan

2023: 539 overdoses with 46 deaths
- Deputies administered 35 dosage units of Narcan

2024: 322 overdoses with 37 deaths
- Deputies administered 16 dosage units of Narcan

2025: 259 overdoses with 24 deaths
- Deputies administered 16 dosage units of Narcan



NARCOTICS

- The Burke County Sheriff's Office has a dually sworn Narcotics investigator with the ATF to be able to prosecute drug crimes on a Federal level
- In 2025, we have had at least 5 cases charged on the Federal level
- The Burke County Sheriff's Office charged 29 people with Trafficking illegal substances in 2025





2025 CALLS FOR SERVICE

- There were a total of **30,185** calls for service in 2025
- The Burke County Sheriff's Office drove 1,414,602 miles in 2025
- The Burke County Sheriff's Office has 92 cars assigned to Deputies with 3 working spares



2025 CALLS FOR SERVICE

Part I Crimes	
· Murder	4
· Rape	25
· Robbery	5
· Assault	68
· Burglary	130
· Larceny	319
· Auto Theft	62
· Arson	4
Part II Crimes	
· Drugs	239
· Assault, Simple	255
· Forgery/Counterfeit	18
· Fraud	104
· Embezzlement	1
· Stolen Property	11

Part II Crimes con't	
· Vandalism	117
· Weapons	17
· All Other Sex Offenses	16
· Gambling	16
· Liquor Law Violations	17
· Disorderly Conduct	8
· Obscenity	13
· Kidnapping	5
· All Other Offenses	133

Part I Crimes are down 17% from 2024

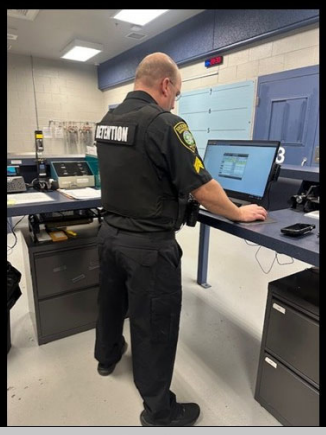
Part II Crimes are down 6% from 2024

SEX OFFENSE CASES

- Investigator Browning
  - 27 ICAC related investigations
  - Dually sworn with the FBI to be able to prosecute these cases on the Federal level when the need arises

- Investigator Smith
  - 69 sex offense cases
  - Approximately 180 investigations from DSS that require review and follow up

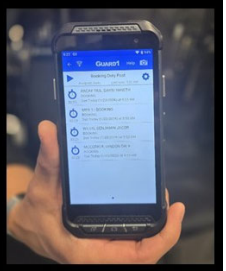
JAIL BOOKINGS FOR 2025



January	243
February	299
March	300
April	277
May	293
June	279
July	353
August	321
September	291
October	255
November	255
December	231
Total:	3,397

JAIL ENHANCEMENTS

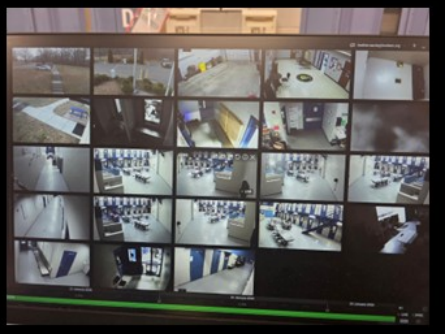
- Installed the Tek84 body scanner, significantly reduces the risk of drugs and other contraband being smuggled into the jail. Though it is a great tool to have, nothing is 100% effective.
- We began renting bed space to other Sheriff's Offices in need in April 2023, bringing in $1.2 million in revenue
- Improved staff quality, reducing vacancies from 27 when taking office to only 7 vacancies to date.
- Integration of new mobile devices (Guard One) for detention officers which eliminates paper logs and creates a time/date stamped record. Which reduces administrative follow up time related to late/missed checks and supports both inmate welfare and staff performance monitoring.

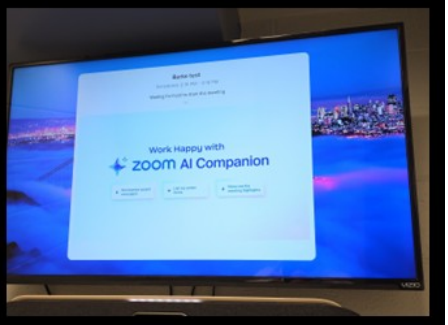


- Improved camera monitoring system (Wisenet WAVE), reducing the man-hours to operate. It allows authorized supervisors and administrators to securely view live and recorded footage without being physically present in the control room. This also reduces time spent trying to locate incidents, reviewing footage and responding to administrative or investigative requests.

- Updated the equipment that helped expand mental health services in the jail (Web-Based Video System Upgrade). This helps with remote clinical evaluations. The upgrade has significantly increased system reliability and improved video and audio quality, which allows for more effective communication between the inmate and provider.

- Started Medication Assisted Treatment (MAT) program in the jail to help inmates with opioid use disorder (with a grant and no local dollars). The Sheriff appreciates Katie Samuels for helping secure the $225,000 funding for the MAT program.



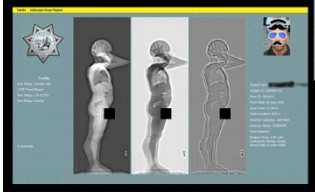




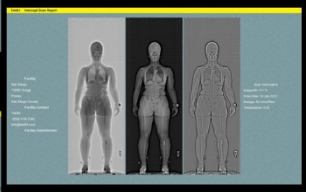
Tek84 Body Scanner







Examples of the Tek84 Body Scanner



*These images are stock images from the TEK84 Body Scanner and are not an inmate from the Burke County Jail

INMATE TRANSPORTATION 2025



STATE TRANSPORT TEAM

Trips to other Jails, Prisons and Mental Health Facilities – 536

Total Miles Driven In 2025 – 92,537

ARRESTS AND REPORTS - 2025

- Arrests Made in 2025: 1,522

- Reports Taken: 2,352



2025 DRONE USAGE



The Drone was used a total of 11 times in 2025.

It was used for:

- Crime Scene Documentation – 1
- Mass Gathering Scene Surveillance – 1
- Search Warrant Service – 2
- Drone Training – 6
- Standoff/SWAT operation – 1
- Assist Other Agency - 1

We were able to purchase one of the drones with grant money from the Governor's Crime Commission.

TECHNOLOGY EQUIPMENT

- How technology helps law enforcement
  - Real time alerts
  - Crime-solving power
  - Community protection

- Proven results in Burke County
  - Recovered over $150,000 in stolen vehicles and property
  - 12 arrests were made from new technology alerts
  - Seized $75,000 in illegal narcotics
  - Located runaway juveniles
  - Generated multiple investigative leads

TECHNOLOGY EQUIPMENT

- Why expansion of technology matters
  - Burke County spans 511 square miles and, according to U.S. Census estimates from July 2024, has a population of 88,545—presents unique challenges for law enforcement coverage.

  - Expansion would:
    - Enhance coverage across rural and urban areas
    - Provide faster response times to criminal activity
    - Strengthen ongoing investigations with more comprehensive data
    - Enhance community safety by deterring crime - it enables quicker arrests and putting potential offenders on notice.

OSCAR 360

OSCAR 360 is a two-part, law-enforcement-focused system designed to capture, organize and present immersive, 360-degree spherical and digital evidence from crime scenes, crash sites and secure facilities. It enables investigators to create, view and present comprehensive, virtual and interactive walkthroughs of scenes, ultimately ensuring that all evidence is properly documented and that the scene is presented to a jury in a clear and understandable format.





NEW DUTY FIREARMS



The Burke County Sheriff's Office has acquired new duty sidearms.

The new pistol is the Glock Model G45. We were able to purchase the Holosun SCS and installed them on the new duty pistols.

These sights provide deputies a tactical advantage over pistols without optics. The deputy can now focus on the threat instead of concentrating on the front sight of the pistol.

The total cost of the pistols was $98,445. The purchase was partially funded through the trade of court-awarded seized firearms valued at $12,225. An additional $34,085 was covered by trading in our existing firearms.



Chairman Brittain opened the floor for questions or comments. Sheriff Hinceman responded to several clarifying questions regarding the difference between arrests and charges, the arrest-to-charge ratio, the cost of operating the jail, and the funding needed for additional cameras, including body and road cameras. Commissioner Burns thanked the Sheriff for his service and acknowledged the transformational impact of his work.

Brian Epley, County Manager, presented an introductory slideshow to provide context for the public safety presentations that followed. Highlights included:



Strategic Plan Focus

Focus Area 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.

Focus Area 2: Economic Growth & Sustainment

To promote Burke County as a business and economic center in the region through recruitment of new industries and creating a healthy business climate for existing businesses.

Focus Area 3: Public Safety & Wellbeing

To ensure the safety of our residents through efficient and effective public safety agencies.

Focus Area 4: Fiscal Stewardship

To pursue a high-performing organization model that ensures high quality, transparency, and efficient use of public resources.

Focus Area 5: Employer of Choice

To promote a professional value-based employee centric workplace that promotes innovation, performance, integrity, and differentiation.

BURKECOUNTY

2022 Public Safety Focus Areas

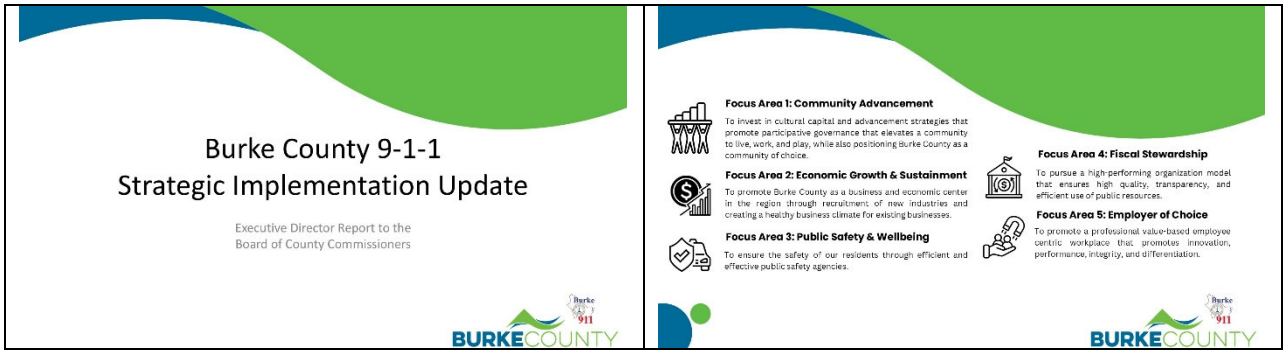
- Fire Marshal: Increase annual inspection compliance rate. Was 14%
- Sheriff: Additional staffing and resources
- 911 Communications: Quality Assurance and Staffing Stabilization
- EMS: Reduction in response time, staff retention, and base location considerations

Public Safety Funding

Department	FY 23	FY 24	FY 25	FY 26	% Change
Detention Center	$5,749,295	$6,430,034	$6,824,177	$6,981,312	2%
Sheriff's Department	$8,334,000	$9,415,974	$10,640,279	$11,392,924	7%
Emergency Medical Services / EM	$7,713,065	$8,639,608	$8,562,050	$8,923,490	4%
Fire Marshal's Office	$428,075	$563,759	$588,664	$484,043	-18%
E-911/Communications	$2,625,355	$3,065,732	$3,477,312	$3,181,115	-9%
Total Public Safety Budget	$24,829,790	$27,999,945	**$30,092,482**	**$30,962,884**	3%



Heather Joyner, 911 Director, and Chris White, 911 Assistant Director/PIO, presented a joint public safety presentation as follows:



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Who We Are

Burke County 9-1-1 is the County's Critical Communications Infrastructure.

We are:

- The primary Public Safety Answering Point (PSAP) / 911 Center for Burke County
- A 24/7/365 emergency communications and coordination center - an access point for both emergency and essential non-emergency services
- The operational infrastructure serving:
  6 Law Enforcement Agencies, 22 Fire Departments, Fire Marshal's Office, Emergency Management, Countywide EMS, State Partner Agencies, Animal Control, Public Utilities, and On-Call Social Services
- A life-safety system processing approximately 200,000 calls and facilitating nearly 2 million radio transmissions annually
- Providers of pre-arrival medical and safety instructions to citizens until help arrives

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Who We Are





BURKECOUNTY

Burke County 911 Strategic Plan Review

Call Processing • Focus on improving call processing times.	**Better Utilize** • Better utilize the current CAD system, Integrate the toning system with CAD and upgrade dispatch consoles.	**Retention** • Focus on retention of 9-1-1 staff.
Strengthen • Strengthen employee training and quality assurance initiatives	**Backup Center** • Establish a fully functional backup 9-1-1 center.	**Relationships** • Focus on building relationships.

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Organizational Condition at Leadership Transition

Workforce:

- 23 vacancies out of 36 full-time positions (64% vacancy rate)
- Absence of a sustainable leadership infrastructure
- Supervisors without formal leadership training
- No structured CTO program
- No succession planning
- No formal onboarding with training or internal academy

Operational Systems:

- CAD project incomplete after 3 years of trying to implement
- No sustainable CTO/QA program
- Inconsistent EMD/ECHO determinant usage
- No structured performance coaching model
- 40% of current CAD usage (CS)

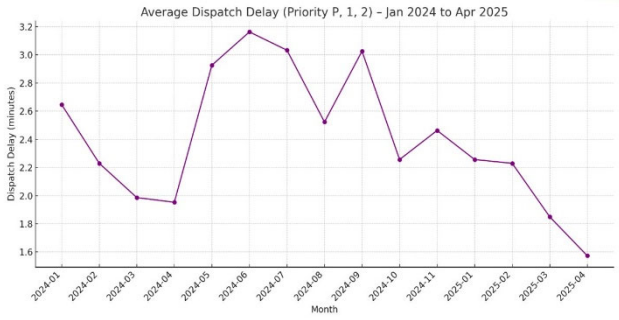
Burke 911 BURKECOUNTY

Call Processing, Quality Assurance & Technology Modernization

- Expanded certified trainers and quality assurance staff to strengthen supervision and performance coaching
- Standardized dispatch procedures across Fire, EMS, Law Enforcement, and Emergency Management to improve response accuracy and consistency
- Modernized the CAD (Computer Aided Dispatch) system and transitioned to a more reliable phone platform to improve system stability and reliability
- Enhanced fire first responder response mapping and call routing in partnership with IT and GIS to increase efficiency and reduce non-emergency workload

Burke 911 BURKECOUNTY

Operational Improvements



Current 3 Month Average Dispatch Delay: 1.2 Minutes

Burke 911 BURKECOUNTY

Operational Performance & Stability

- Standardized emergency dispatch procedures across Fire, Fire Marshal, EMS, Law Enforcement, and Emergency Management to improve response accuracy and consistency
- Strengthened response review and shift-based performance monitoring to support appropriate emergency deployment
- Modernized the CAD (Computer Aided Dispatch) system and are integrating auto-toning technology to improve reliability and efficiency
- Advanced backup center planning, including relocation review, fiber connectivity, security enhancements, and alignment with County emergency and operational stability plans

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Leadership Development & Workforce Stability

- Strengthened frontline leadership by reducing supervisor channel overload, leveraging Lead Telecommunicators, and holding structured monthly accountability meetings
- Launched an Internal Telecommunicator Academy to formalize onboarding, hands-on skills training, and ongoing development
- Implemented consistent performance management and individualized coaching for supervisors and staff
- Built a clear succession and leadership development pathway while monitoring workforce wellness and operational readiness

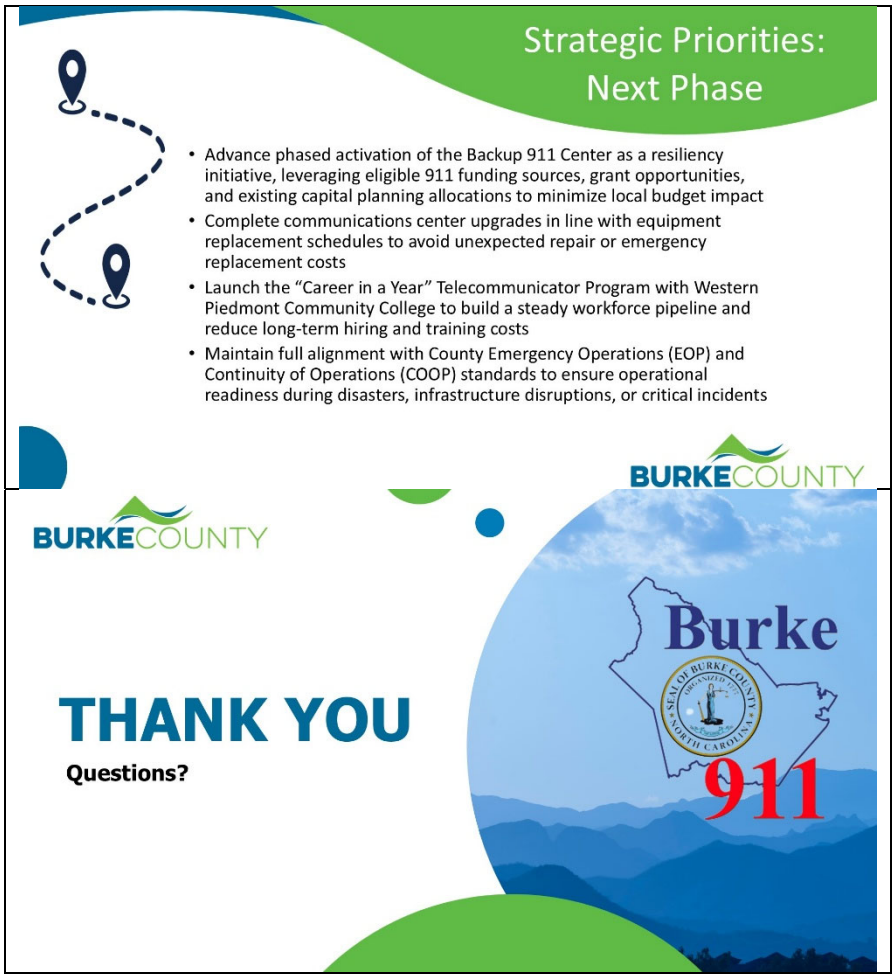
BURKECOUNTY



Workforce Development & Agency Coordination

- Established a partnership with Western Piedmont Community College to launch the "Career in a Year" Telecommunicator Program and build a long-term workforce pipeline
- Developing high school outreach, certification courses, internship pathways, and succession planning to strengthen future leadership continuity
- Deployed the Freedom mobile CAD app to all served agencies and mutual aid partners to improve field coordination
- Standardized Fire, EMS, Emergency Management, and Law Enforcement policies and response plans, with ongoing collaboration through quarterly Fire Chiefs' meetings

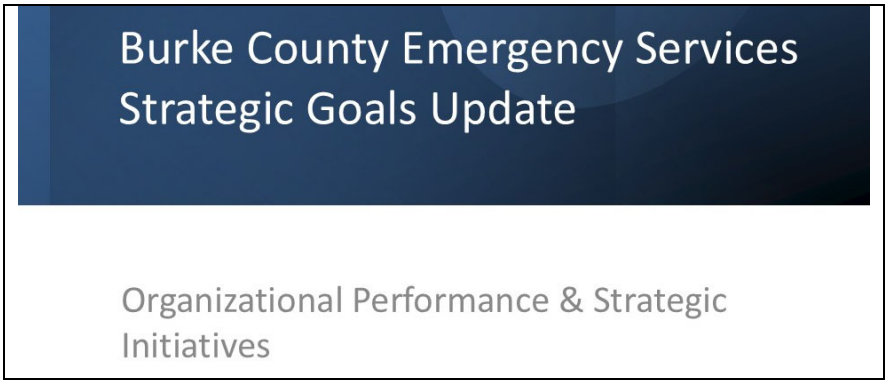
BURKECOUNTY



During the presentation, Mr. White highlighted that the dispatch time had decreased to 47 seconds from the time the call is received to the time emergency services and/or public safety respond.

Chairman Brittain opened the floor for questions or comments. Commissioner Stroud and Burns praised Ms. Joyner and Mr. White for their lifesaving work.

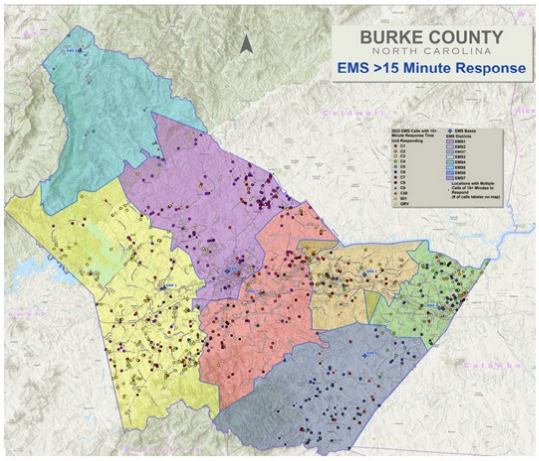
James Robinson, Emergency Services Director, presented a public safety update as follows:

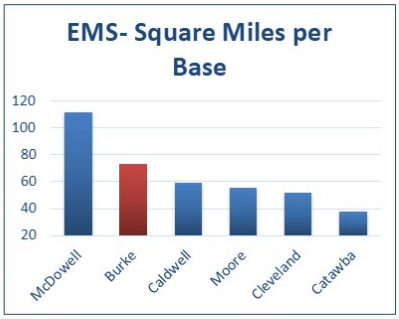


Two Departments - One Name

- Emergency Medical Services (EMS) provides Advance Life Support (ALS) pre-hospital care to the citizens and visitors of Burke County through the activation of the 911 or other means of the emergency services network
- Emergency Management coordinates the county's approach to preparedness, response, mitigation, and recovery from natural, technological, and human caused emergencies/disasters.

Geographic Impact





Goal 1: Internal Engagement

- Develop a culture that promotes empowerment, trust, and open communication.
  - Weekly leadership meetings addressing staffing, policy, recognition, and system updates
  - Formal Field Training Officer (FTO) program implemented to provide on shift education and resources
  - Structured mentorship and defined career pathway established

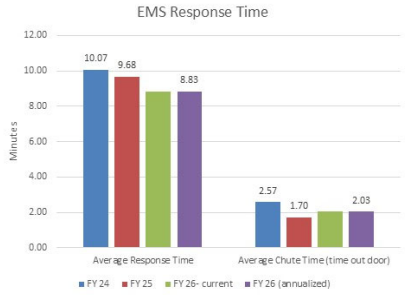
Goal 2: Career Satisfaction, Recruitment & Retention

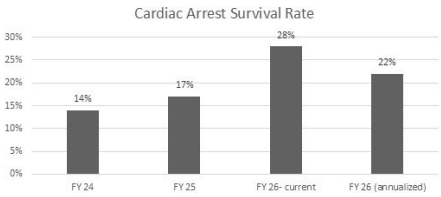
- Ensure overall career satisfaction and ongoing recruitment strategies.
  - Fully staffed 911 division; 1 Community Care Paramedic vacancy
  - First time in over 10 years BCEMS has a waiting list for full time
  - Partnership with WPCC for paramedic academy pipeline
  - Employee participation in committees and open-door leadership policy

Goal 3: Quality & Operational Efficiency

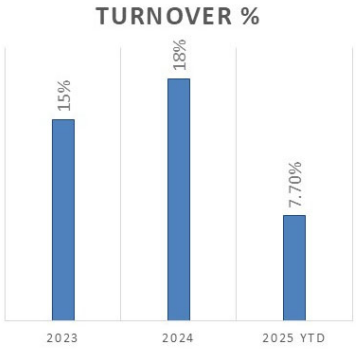
- Provide highest quality service efficiently and enhance future capabilities.
  - 95% patient care chart review to confirm treatment protocol alignment
  - Monthly benchmark monitoring reported to Quality Management Committee
  - Implementation of BEAR Post-Opioid Response Team for low acuity calls
    - Falls without injuries
    - Medical alarms with no known complaint

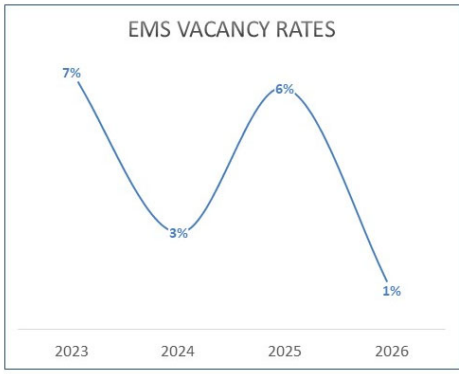
Medical Indicator Improvement





Staffing Stabilization





Accountability and Change



Goal 4: Community Outreach & Engagement

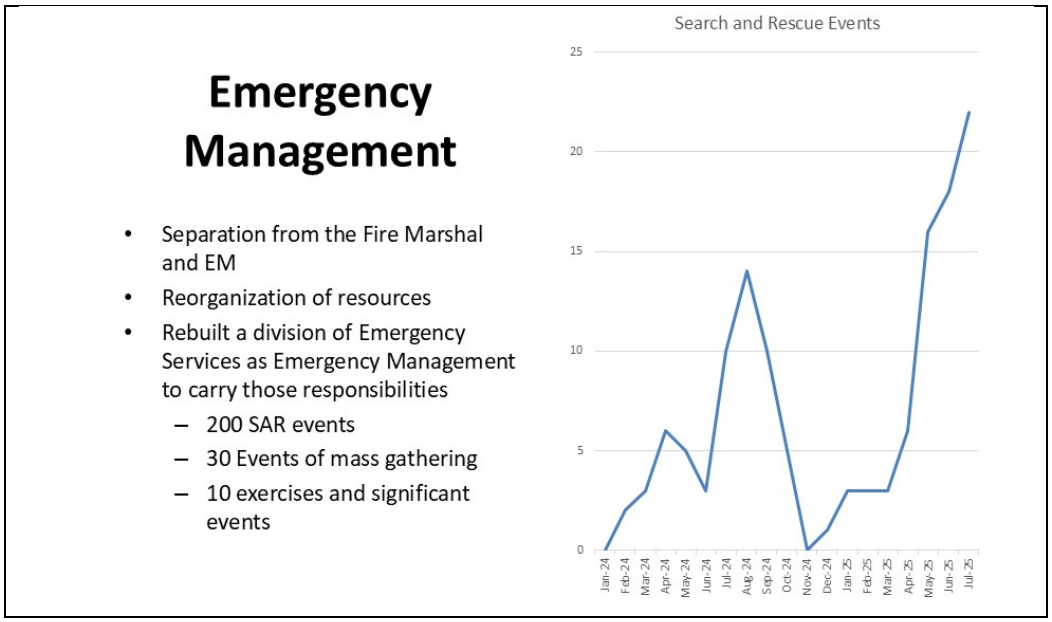
- Increase outreach opportunities and align with community expectations.
  - Outreach group conducting Hands-Only CPR training at public engagement events
  - Engagement with the Burke County Firefighter Association and other partnering groups
  - Strengthening public trust and community engagement through social media platforms

Goal 5: Strategic Partnerships

- Build, repair, and strengthen partnerships within Emergency Services.
  - Monthly coordination meetings with 911, BCSO, BCFMO, BCEM
  - Bi-Monthly participation in the Burke County Firefighter Association meeting
  - Quarterly meetings with UNC Morganton leadership
  - Ongoing communication with regional hospital partners

Goal 6: Capital Expenditure Planning

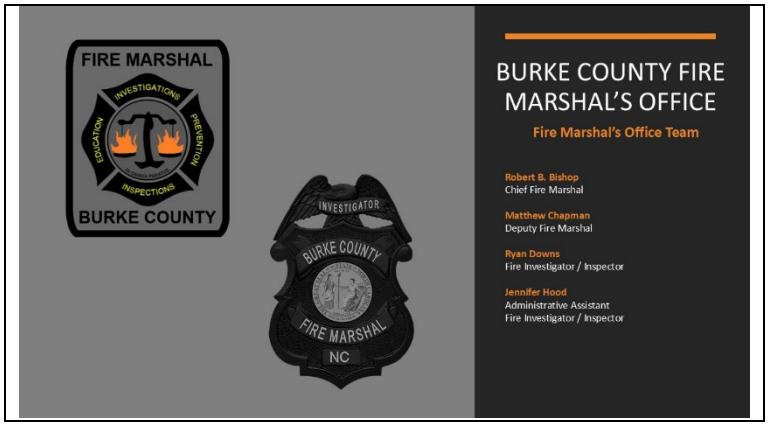
- Develop ongoing capital plan for Ambulances and medical equipment
  - Competitive vendor pricing for fleet maintenance
  - Collaboration with county departments for facility upkeep
  - Grant funding coordination to maximize budget impact



During the presentation, Mr. Epley emphasized that accurate diagnosis is directly linked to proper billing and compliance, which in turn improves reimbursement revenues. Mr. Robinson noted that Burke County ranks among the leading agencies in North Carolina for cardiovascular incident survival rates.

Chairman Brittain opened the floor for questions or comments. Commissioner Stroud expressed concern about the costs associated with tourism-related incidents, particularly when visitors become stranded and require emergency rescue services. Mr. Robinson explained that the Public Information Officer is effective in providing educational messaging that promotes preparedness and a culture of personal responsibility. Mr. Epley added that Burke County may need to reconsider how the costs associated with these incidents are allocated, noting that other parties involved are not currently bearing their fair share of the burden.

Robert Bishop, Fire Marshal, presented a public safety update as follows:



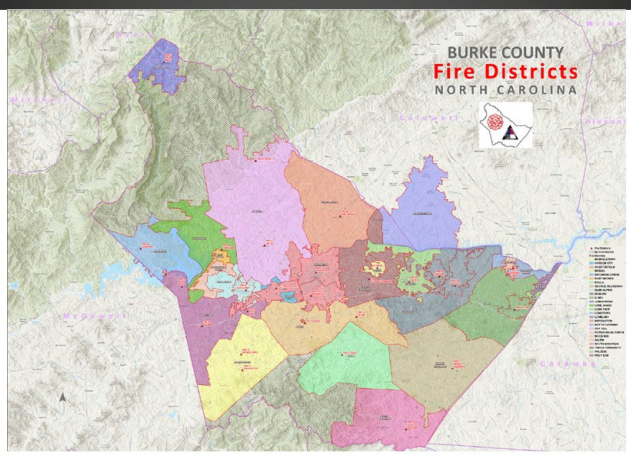


BURKE COUNTY FIRE MARSHAL'S OFFICE

Responsibilities Breakdown

Types of Incidents or Activities

- Fire / Arson Investigations
- Fire Injury & Fatality Investigations
- Explosion Investigations
- Hazardous Materials Response
- Commercial Fire Inspections
- Public / Private School Inspections
- Operational & Construction Permitting
- Foster Home Inspections
- Building Plan Reviews
- Fire & Life Safety Plan Reviews
- Fire Protection System Reviews
- Fire Prevention Programs
- Fire / Safety Training Programs for Businesses





BURKE COUNTY FIRE MARSHAL'S OFFICE

Day-To-Day Operations

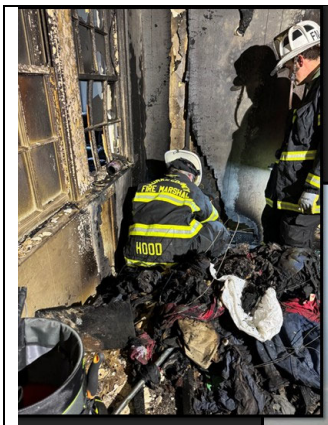
The daily operation of the Fire Marshal's Office consists of performing fire and life safety inspections for commercial occupancies in Burke County. The office also processes and issues occupancy permits, performs building plan and fire/life safety reviews, site visits, community outreach, and responds to emergency calls for service.

The Fire Marshal's Office is also responsible for determining origin and cause investigations for incendiary fires, investigating fires with injuries or fatalities, open burning complaints, and other applicable fire or explosion incidents when requested.

Fire scene processing often includes examination, collection, and transfer of fire scene evidence to the NC State Bureau of Investigation Crime Lab for examination.

Additionally, the office serves as a liaison between County Administration and:

- 19 Burke County Fire Departments
- 3 Out-of-County Fire Departments (w/ territory in Burke County)
- Burke County REACT (Traffic Control Team)





BURKE COUNTY FIRE MARSHAL'S OFFICE

Fire Marshal Team Annual Continuing Education

Requirements per employee, all listed certification types are affiliated with or reciprocate with other listed certifications:

Hours	Type
40	Fire Investigations
24	Fire Inspector
10	Fire Life Safety Educator
36	Firefighter I/II
12	Haz-Mat
12	Rescue
36	Emergency Medical Technician

Total Hours Per Team Member – 170 Hours

BURKE COUNTY FIRE MARSHAL'S OFFICE

Public Safety Study

Deficiencies identified during the comprehensive public safety study performed by NC Fire Chief Consulting determined multiple areas in day-to-day operations that could use improvement for the Fire Marshal's Office and Emergency Management.

In the early months of 2025, the Public Safety team met and discussed options to decrease employee fatigue, enhance the county's capabilities to serve and protect its citizens and visitors, and reduce the number of fire injuries and accidental commercial fires by improving the existing fire inspection program.

The implementation of these changes can be associated with each of the 5 Focus Areas of the Commissioners' Strategic Plan.

Changes Suggested by the Consultant Study & Implemented

- Separation of the Fire Marshal's Office & Emergency Management Divisions *(Established Office of the Fire Marshal)*
- Implementation of a modern Records Management System platform for fire inspections and fire investigations
- Reclassify one existing FTE to the Fire Marshal's Office to increase the department's capabilities

BURKE COUNTY FIRE MARSHAL'S OFFICE

Where We Were

For approximately 15 years, 3 employees performed:

- Emergency Management responses for approximately 514 square miles (including waterways)
- Commercial & Foster Home Inspections
- Building Plan Review, Fire & Life Safety Reviews
- Permit Processing, Invoice Collection
- Structure, Vehicle, & Outside Fire Investigations
- Wilderness, Urban, & Water Rescues, Medical Carry outs
- Fire Marshal / Emergency Management Outreach
- Haz-Mat Incident Response

The combination of both divisions made it impossible to maintain efficiency with duties and statutory requirements for fire inspections due to extensive call volume. Often, inspections would have to be abandoned to respond to extended Emergency Management incidents for a duration of typically 4 to 10 hours per incident.

Following an evaluation by the NC Office of State Fire Marshal in 2023/2024, our office was near being placed on probation by the State Fire Marshal due to the extensive number of overdue commercial inspections in Burke County.

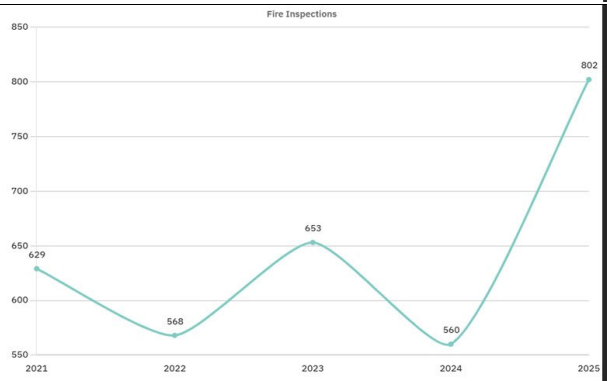
BURKE COUNTY FIRE MARSHAL'S OFFICE

Public Safety Consultants Study

In 2024, NC Fire Chief Consulting performed a cross-functional strategic review of public safety operations for Burke County Government at the request of County Administration.

This study identified and recommended the following for the Fire Marshal's Office:

- Increasing staffing levels to gain compliance with required fire inspections set forth by the NC General Statute, National Fire Protection Association, and the NC Office of State Fire Marshal
- Reorganization of the Fire Marshal's Office & Emergency Management Divisions due to the current and increasing workload and dual responsibilities of team members
- Implementing a modern Records Management System for Fire Inspections, Fire Investigations, Permitting, and Invoicing



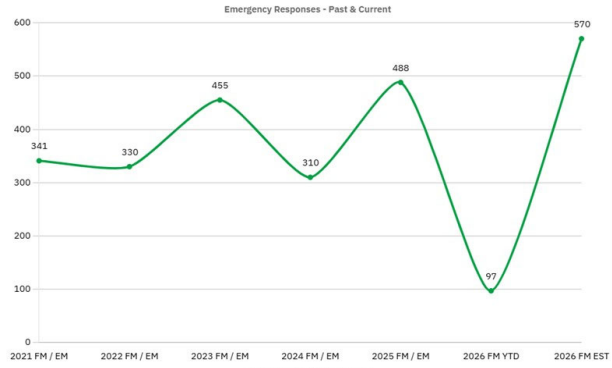
This line graph represents the last 5 years of annual fire inspections performed and includes 6 months of operation in the year 2025 under the recommended changes detailed by a comprehensive study.

During the onset of restructuring in March 2025, the department was at approximately 15% of annual inspections being completed. Upon ending the 2025 year, the department's completed inspection rate had dramatically increased to 64.97%.

BURKE COUNTY FIRE MARSHAL'S OFFICE

Where We Are Now

- Office of the Fire Marshal Established
- Chief Fire Marshal Selected
- Deputy Fire Marshal Selected
- Fire Inspector Selected
- Completed reclassification of one Full-Time Employee position to the Fire Marshal's Office *(Administrative Assistant); this employee also possesses Fire Inspector & Investigator certification*
- Implemented new Records Management Software Platform for Fire Inspection, Fire Investigation, Permitting, Plan Review, Incident, and Invoice tracking
- Increased annual fire inspections completed from 15% to nearly 65% within 6 months of reorganization and implementation of the Consulting Study recommendations.
- Implemented a Quality Assurance component for our fire inspection program to evaluate time management, effectiveness, stability, workflow, and customer service experiences



This line graph represents annual emergency call responses for the Fire Marshal's Office since 2021. These responses would have included a mixture of both incident types, shown to the right of this graph, broken down by division type. Also included is a 2026 year-to-date total, with an estimated annual total based on the current 2026 year-to-date call volume. It should be noted that even with the separation of the Fire Marshal's Office from Emergency Management, there are various types of incidents that require a response from both agencies.

After the reorganization of both departments, the Fire Marshal's Office's primary duties for emergency response are indicated to the right of this line graph. These duties and response totals do not include fire inspections, permitting, building/plan reviews, commercial site visits, phase 1 assessments, training sessions held for businesses and the public, community relations events, or other fire code-related inspections.

BURKE COUNTY FIRE MARSHAL'S OFFICE

Emergency Responses By Division

Fire Marshal

- Structure, Vehicle, Outside Fire Investigations
- Fire Injury & Fatality Investigations
- Explosion Investigations
- Fire Code Complaints
- Haz-Mat Incidents
- FD Requests for Support
- Public Threats
- Mass Casualty Incidents

Emergency Management

- Urban Search & Rescue
- Wilderness Search & Rescue
- Water Rescue Incidents
- Haz-Mat Incidents
- DP8 Asset Deployment
- Local EM Asset Deployment
- Incident Management Team (Support)
- Public Threats
- Mass Casualty Incidents

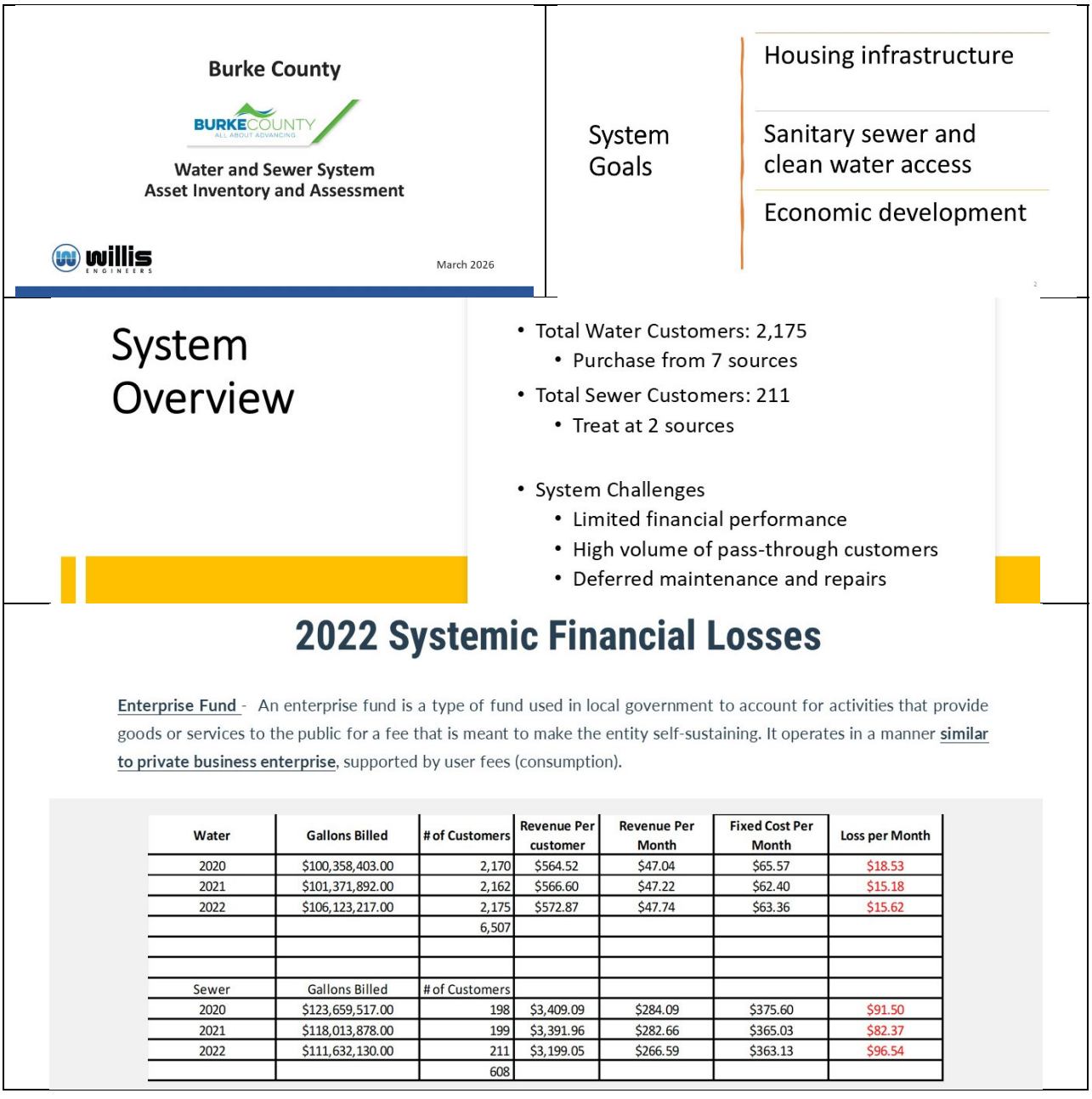
Chairman Brittain opened the floor for questions or comments. Mr. Bishop received praise from Commissioner Barrier on his leadership and self-reflection.

RECESS OF THE MEETING

Chairman Brittain called for a brief recess at 10:21 a.m., and the meeting resumed at 10:29 a.m.

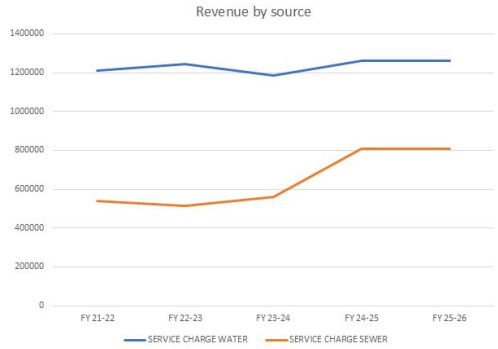
CM - WATER & SEWER AIA (ASSET & INVENTORY) REPORT

Brian Epley, County Manager, provided a brief historical overview of the Water and Sewer Asset & Inventory Report as follows:



Water	Gallons Billed	# of Customers	Revenue Per customer	Revenue Per Month	Fixed Cost Per Month	Loss per Month
2020	$100,358,403.00	2,170	$564.52	$47.04	$65.57	$18.53
2021	$101,371,892.00	2,162	$566.60	$47.22	$62.40	$15.18
2022	$106,123,217.00	2,175	$572.87	$47.74	$63.36	$15.62
		6,507				
Sewer	Gallons Billed	# of Customers				
2020	$123,659,517.00	198	$3,409.09	$284.09	$375.60	$91.50
2021	$118,013,878.00	199	$3,391.96	$282.66	$365.03	$82.37
2022	$111,632,130.00	211	$3,199.05	$266.59	$363.13	$96.54
		608				

Minimal Operating Margin




BURKE COUNTY
ALL ABOUT ADVANCING

January 20, 2026

NC Department of State Treasurer – Local Government Division
3200 Atlantic Avenue
Raleigh, NC 27604

Re: Response to the Auditor's Findings, Recommendations, and Fiscal Matters for the Fiscal Year Ended June 30, 2025

Per 20 NCAC 20 03 .0508 which requires the governing body to develop a "Response to the Auditor's Findings, Recommendations, and Fiscal Matters" signed by a majority of the members of the governing body and submitted to the Local Government Commission (LGC) within 60 days of the auditor's presentation, Burke County is responding to the ratio of 0.3997 on Capital Assets Condition in the Water/Sewer Fund per the "Performance Indicators of Concern" worksheet.

The Capital Assets Condition Ratio calculates the remaining useful life of all depreciable assets in the fund. A remaining useful asset value of less than 0.50 may signal the need to replace the assets in the near future.

An inventory assessment is in the final phase to evaluate the full system and its needs. Once the assessment is received, data will be reviewed, options for funding identified and further plans will be made by the Board and management to best address assets needing replacement and prioritize those needs. Burke County will use the data to also evaluate the potential rates charged for both Water and Sewer customers for the coming fiscal years to allow for funding a long-term capital plan.

Sincerely,

Jeffrey C. Carnes, NC, Chair
Phil Smith, Vice Chair
Brian Barrier, Commissioner
Randy Burns, Commissioner
Mike Stroud, Commissioner
Brian Epley, County Manager
Margaret Pierce, Dep Co. Mgr/Finance Director

200 Avery Avenue · P.O. Box 219 · Morganton, NC 28680-0219
County Manager: (828) 764-9300 · Clerk to the Board: (828) 764-9354 · www.burkenc.org

3 Phase System Evaluation Approach

Phase I – Pump Lift Station Replacement:

- Located in East Burke, the Indian Hills sewer pump station is subject to frequent stream flooding and experiences excessive peak flows.
- The pump station and force main need to be upgraded such that peak flows of up to 2,000 gpm can be handled.

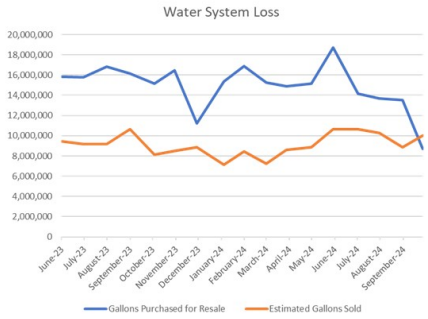
Phase II – Water & Sewer Asset Inventory Analysis (AIA):

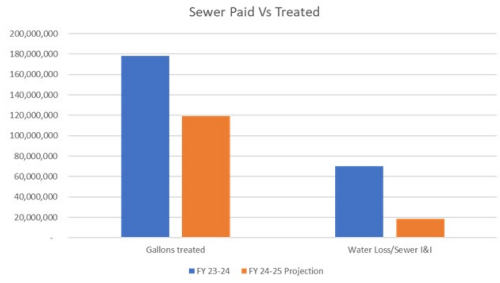
- Complete assessment of existing water and sewer infrastructure – including all force main and pump stations.
- Planning, design, and permitting for the proposed sewer projects.
- Infrastructure Mapping and GIS Layering Coordination
- Prioritized listing of needed improvements, repairs, and enhancements
- Probable Cost Analysis
- Review of existing system purchase contracts

Phase II – Water & Sewer Asset Inventory Analysis (AIA):

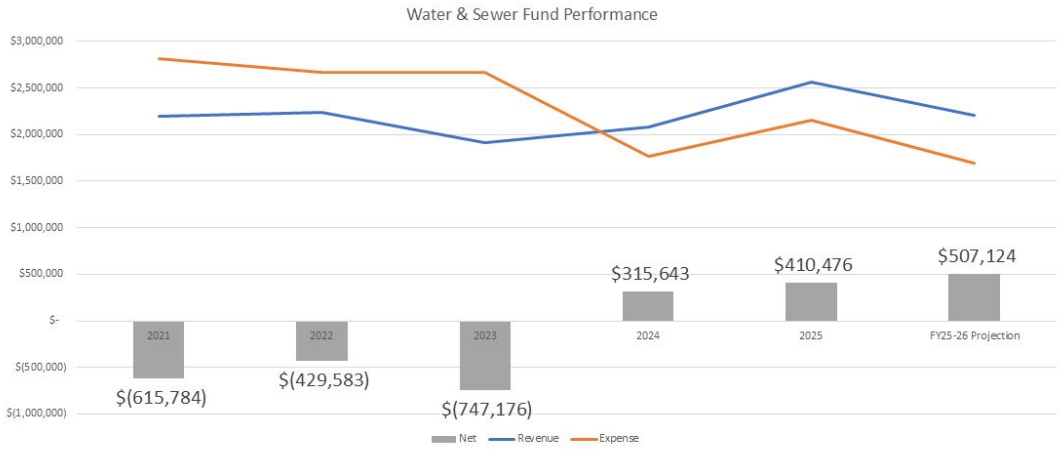
- Rate Stabilization Analysis
- Expansion, Acquisition, and/or Regionalization Metrics
- In Source / Outsource Evaluation

Water & Sewer





Historical Fund Performance



At this point in the presentation, Chuck Willis and Sydney Potter from Willis Engineering gave a joint presentation on the Water and Sewer AIA update as follows:

Presentation Summary

Background

Project Overview

Asset Management Plan Framework

Water and Sewer Systems Overview

Findings

Next Steps

Background

About Willis Engineers

Why do Counties provide water and sewer service?

- No municipal service (no other option)
- Promote industrial development
- Allow higher residential density (affordable housing)

What is an Asset Inventory and why is the State funding it?

- Typically overlooked and underfunded
- NC DEQ priority in grant funding
- Burke Co. $500,000 direct appropriation in 2023 State budget

Definitions

Asset Inventory and Assessment (AIA) – Developing a tangible record of all system assets and their condition.

Capital Improvement Plan (CIP) – A guide for future capital projects that will be required to best serve your customers.

Asset Management Plan (AMP) – A tactical plan for managing infrastructure to minimize the total operation and maintenance costs while maintaining a desired level of service for your customers.

Project Overview

Began work in March 2024

Completed in December 2025

Final Deliverables

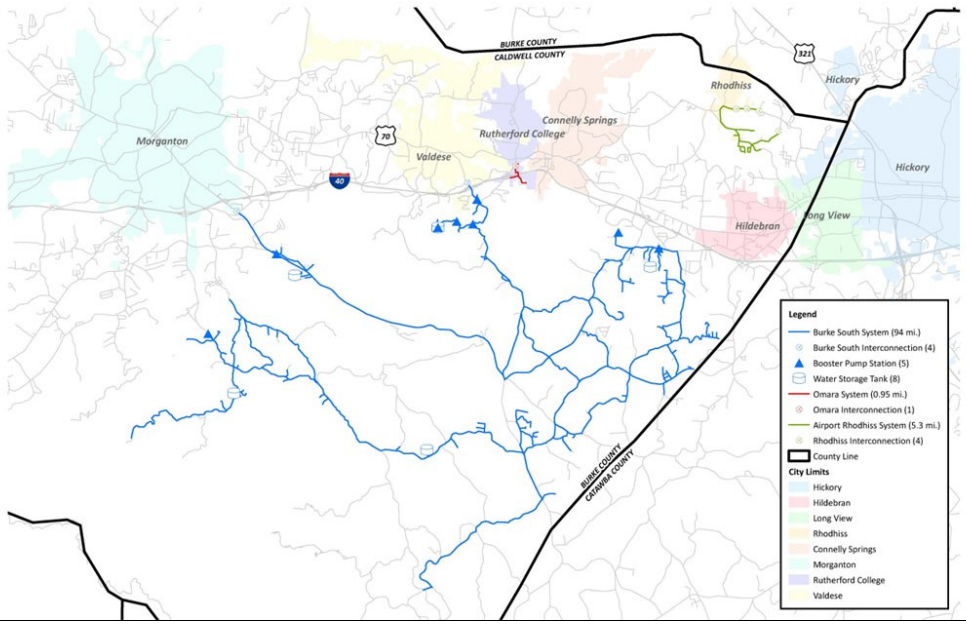
- Asset Management Plan Reports
- Maintenance Map Books
- GIS Shapefiles
- Field Program Data and Reports
- Wastewater Capacity Model

Asset Management Plan Framework

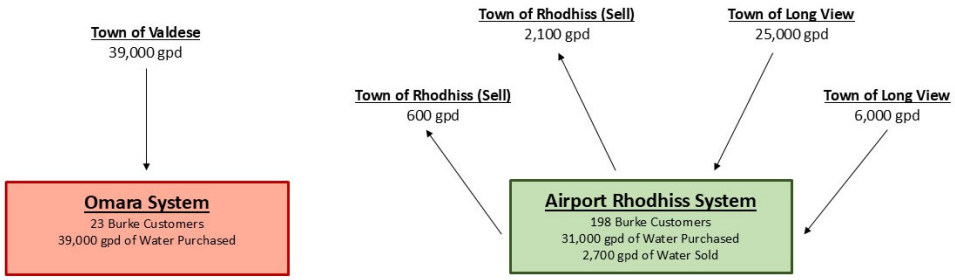


Water System Assets

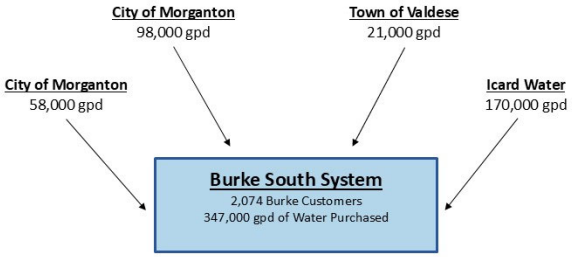
Asset	Summary
Customer Connections	2,342
Water Distribution Piping	103 miles
Valves	1,000
Fire Hydrants	386
Elevated Storage Tanks	5
Booster Pump Stations	8



Omara & Airport Rhodhiss Water

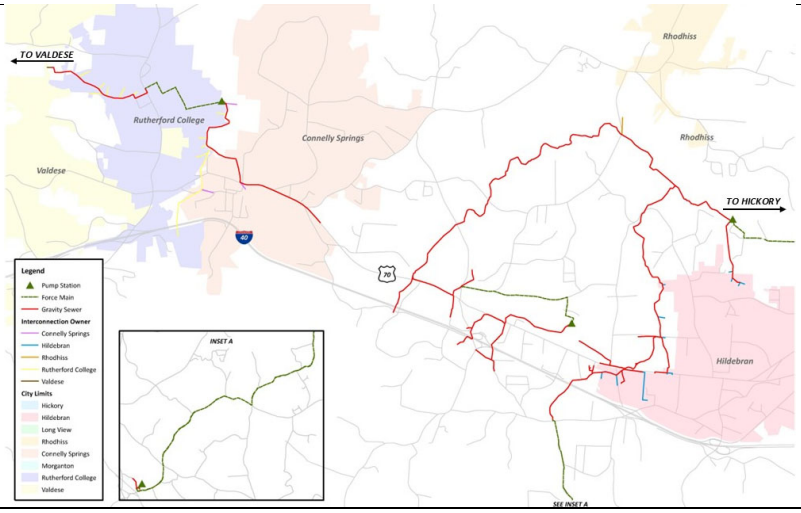


Burke South Water

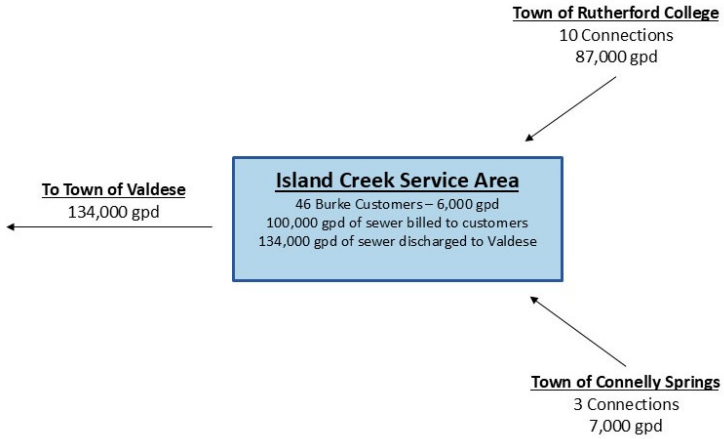


Sewer System Asset Summary

Asset	Summary
Customer Connections	185
Gravity Collection Sewer	19 miles
Manholes	429
Pump Stations	4
Force Main	12 miles
Air Relief Manhole	15



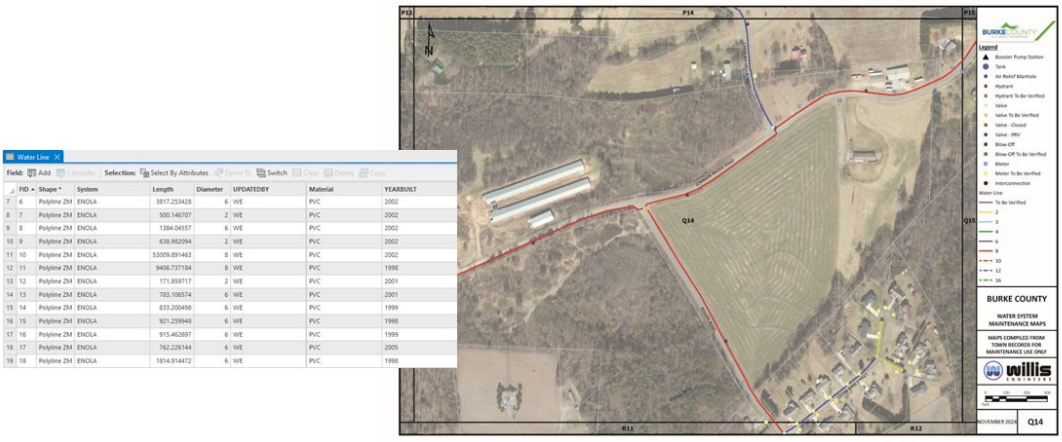
Island Creek Sewer



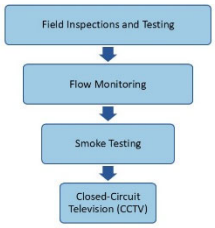
Indian Hills Sewer



Maintenance Maps and GIS Database



Field Investigations



Inspections and Testing

- Drawdown Testing
- Condition Assessment
  - Mechanical
  - Electrical
  - Structures
  - Site Safety (Access, Fencing, Locks, etc.)
  - Other Site Components



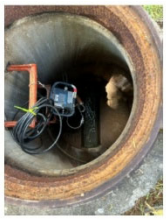


Flow Monitoring

- Flow Meters
- Level Monitors
- Rain Gauges

- Quantifies Flows
- Guides Subsequent Investigations
- Used in Model Calibration





Smoke Testing

- Detects Manhole Leaks
- Defective Sewer Cleanouts
- Mainline Issues Including Cracks
- Sewer Lateral Deficiencies
- Storm Drainage Connections
- Unknown Connections





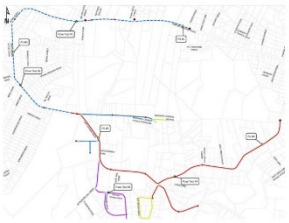
Closed-Circuit Television (CCTV)





Water Distribution Model

- WaterGEMS Software
- Fire Hydrant Testing for Model Calibration
- Identify Potential Deficiencies
  - Normal Flow
  - Fire Flow
- Simulate Demand from Future Development



Sewer Collection Model

- Analyze Flow
- Calibrate Model
- Evaluate Potential Sources of Infiltration and Inflow
- Identify Deficiencies
- Simulate Future Development
- Assist in Development of Capacity Assurance Worksheets



Findings – Data Review

Field Program Findings

Excessive Unaccounted-for Water

Excessive Infiltration and Inflow

Disparities in Billing Rates

Wastewater Capacity Limitation

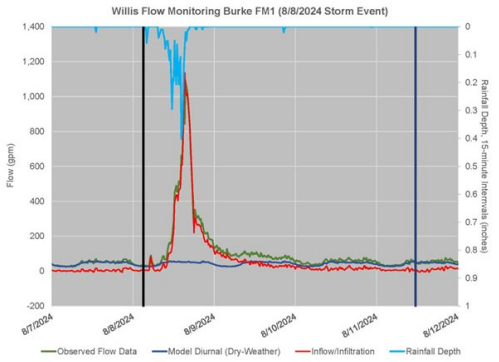
Findings – GIS System

- All system assets incorporated
- Attributes
- Construction drawings versus as-built drawings
- Field verifications



Findings – Flow Monitoring

- 10 Flow Meters and 1 Level Monitor Installed
- May – August 2024
- Average Daily Flow Analysis
- Peak Flow Analysis – 5 Rain Events
- Identified locations for additional investigation (smoke testing)



Findings – Smoke Testing

- 81 Total Defects
  - 52 Manhole
  - 20 Cleanout
  - 5 Main Line
  - 1 Concrete Box
  - 1 Grease Trap
  - 1 Roof Downspout
  - 1 Abandoned Line





Findings – Visual Inspections

- Condition Assessment
- Risk Analysis
- Drawdown Testing
- Additional I&I Sources Identified





Mineral Springs Pump Station #3 — Booster Pump Station Evaluations

5433 Mineral Springs Mtn Avenue — Original Construction — 1996
35° 43' 2" N / 81° 33' 6" W

General Description – This is a duplex-style pump station with two vertical multi-stage pumps. The electrical equipment, pumps, and valving are located inside the pump station building. The pump station utilizes internet for communication with the County's SCADA system.

Service History – Installed replacement pump (year unknown).

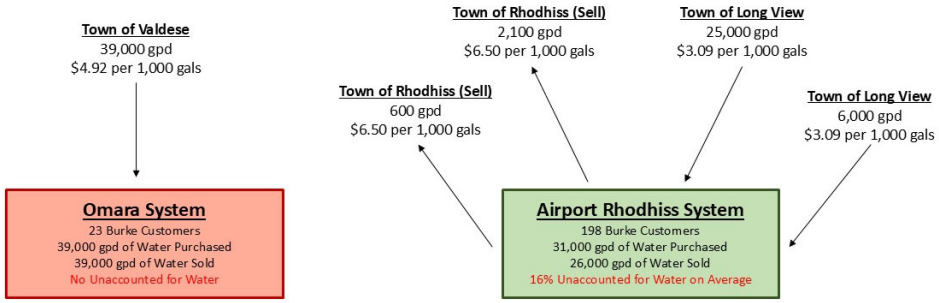
Pumping Equipment	Pump 1 (original)	Pump 2 (replacement)
Pump Manufacturer/Model	Grundfos CR-60-30U	Grundfos CR64
Motor Size	30 HP, 3525 rpm	40 HP, 3525 rpm
Estimated Pump Duty Point	340 gpm @ 130' TDH	339 GPM @ 290' TDH
Electrical Characteristics	230/460 V, 3 Phase, 60 Hz	230/460 V, 3 Phase, 60 Hz

Evaluation Scoring	Score	Comments
Site	8	No site fence
Structures	10	
Mechanical Equipment	8	Aging pumps
Electrical & Controls	4	Gear improperly sized
Overall Score	7.5	

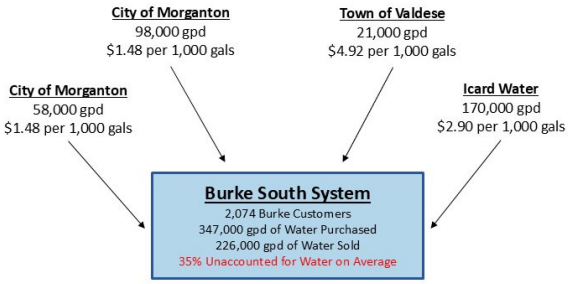
Inspection Observations – Pump 2 has been replaced with a larger pump. The electrical gear at the station appears to be from the original construction and was not upsized to accommodate the larger pump. Other minor deficiencies noted.

Wilks Engineers — DRAFT — Burke County, NC — Water System Asset Management Plan

Omara & Airport Rhodhiss Water



Burke South Water

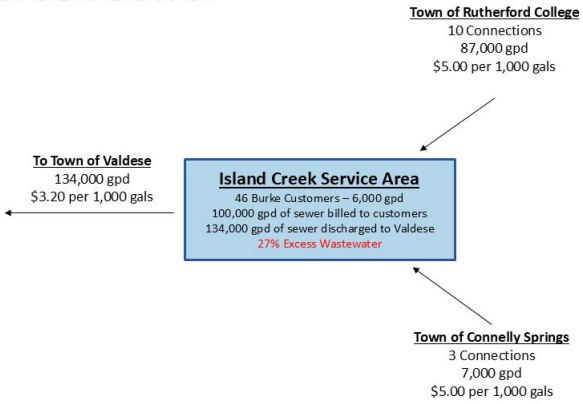


Unaccounted For Water Summary

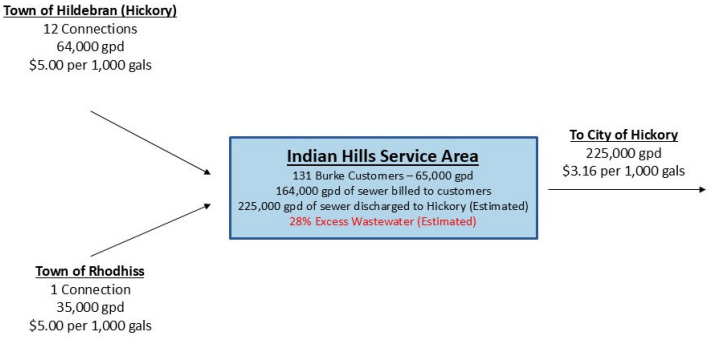
System	Purchased Water (MGD)	Water Sold to Customers (MGD)	Unaccounted For Water (MGD)	Unaccounted For Water (%)
Omara	0.039	0.039	0.000	0%
Airport Rhodhiss	0.031	0.026	0.005	16%
Burke South	0.347	0.226	0.121	35%
Total	**0.417**	**0.291**	**0.126**	**30%**

Unaccounted For Water Summary based on water billings for Fiscal Year 2024 – 2025.

Island Creek Sewer



Indian Hills Sewer

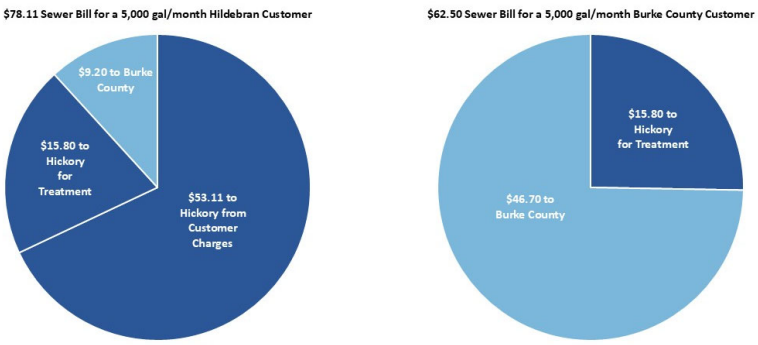


Current Sewer Rate Structure

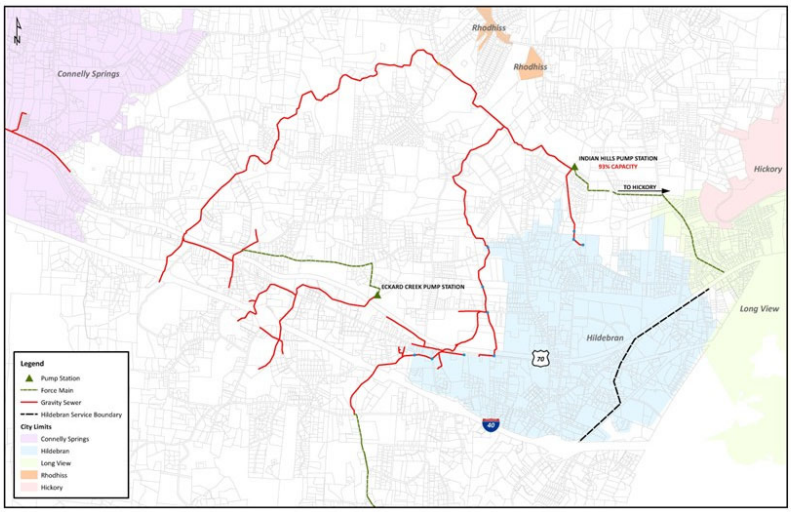
Customer Type	Customer Count	Base Monthly Fee	Consumption Rate	Burke Charge for 5,000 gal/month
Burke County	177 (13%)	$30	$6.50 per 1,000 gals	$62.50
Municipalities	1,155 (87%)	$0	$5.00 per 1,000 gals	$25.00

Current Sewer Rate Structure for Fiscal Year 2025-2026.

Billing Disparities



Indian Hills Capacity Limitation



Next Steps

Currently Underway

- Water Meter Replacement Project
- Long-Term Wastewater Flow Metering Project
- Wastewater System Rehabilitation
- Additional Capacity for Future Development

Long-Term

- Capital Improvement Plan Projects
- Long-Term AMP Recommendations

Water Meter Replacement Project

Replacement of roughly 2,200 water meters

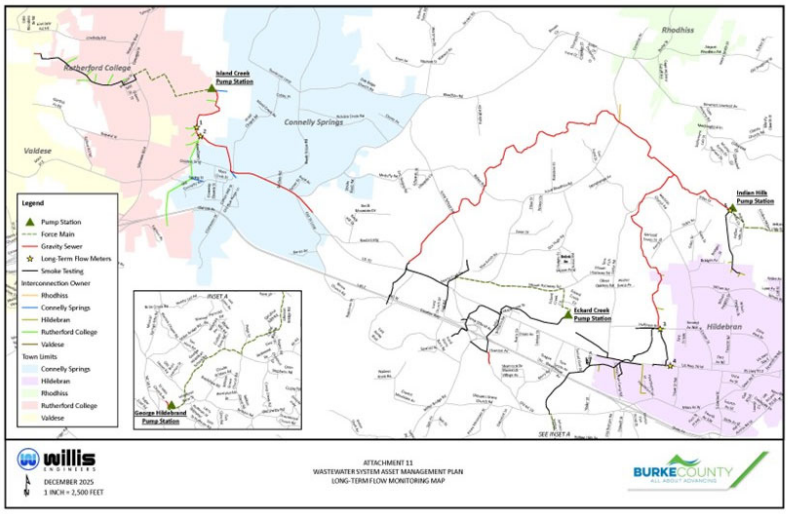
Project Underway in early 2025

Anticipated Completion by June 2026

Total Project Cost: $752,036.42

ARPA Grant through the SFRF

Long-Term Wastewater Metering Project



Long-Term Wastewater Metering Project

Flow Meter Location	Percentage of Flow Captured
1	10%
2	26%
3	4%
4	7%
5	26%
Existing*	16%
Total	**90%**

*Existing flow meter measures pumped flow from the Town of Rhodhiss.

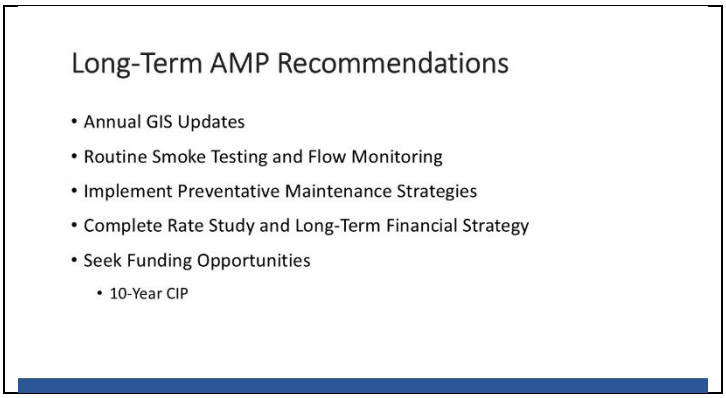
Wastewater System Rehabilitation

MH ID	Rehabilitation Recommendation	Priority
13	Reset Existing F&C	High
23	Replace Manhole	High
29	Install Cementitious Lining	High
42	Install Cementitious Lining, Replace F&C, Seal Precast Joints	High
89	Install Cementitious Lining, Reset Existing F&C, Seal Precast Joints	High
235	Install Cementitious Lining, Seal Pipe Seals	High
285	Reset & Raise Existing F&C, Replace Chimney Section	High
300	Install Cementitious Lining	High
333	Install Cementitious Lining, Rebuild Bench & Invert, Replace F&C	High
341	Install Cementitious Lining, Replace F&C	High
343	Raise F&C to grade	High
348	Install Cementitious Lining, Seal Pipe Seals	High
12	Seal Precast Joints	Medium
19	Install Cementitious Lining	Medium
20	Install Cementitious Lining	Medium
40	Replace F&C, Seal Pipe Seals	Medium
209	Install Cementitious Lining	Medium
212	Install Cementitious Lining, Reset Existing F&C, Seal Pipe Seals	Medium
249	Reset Existing F&C	Medium
259	Replace F&C	Medium
278	Install Cementitious Lining	Medium
286	Install Cementitious Lining	Medium
298	Install Cementitious Lining	Medium
304	Reset Existing F&C	Medium
331	Install Cementitious Lining	Medium
332	Install Cementitious Lining	Medium
336	Install Epoxy Lining	Medium
337	Install Cementitious Lining, Seal Pipe Seals	Medium
338	Reset Existing F&C, Seal Pipe Seals, Smooth/Slope Channel	Medium
339	Install Cementitious Lining	Medium
344	Install Cementitious Lining, Reset F&C	Medium
349	Install Cementitious Lining, Reset Existing F&C, Rebuild Bench & Invert	Medium
351	Install Cementitious Lining, Reset Existing F&C, Seal Pipe Seals	Medium
352	Install Cementitious Lining, Reset Existing F&C, Seal Precast Joints	Medium
354	Install Cementitious Lining, Replace F&C	Medium
355	Install Cementitious Lining, Replace F&C	Medium
357	Install Cementitious Lining	Medium
365	Raise F&C to grade	Medium
366	Raise F&C to grade	Medium
370	Install Cementitious Lining, Seal Pipe Seals	Medium
373	Install Cementitious Lining, Seal Precast Joints	Medium
375	Install Cementitious Lining, Reset F&C, Rebuild Bench & Invert	Medium
376	Rebuild Bench & Invert, Seal Precast Joints	Medium
379	Install Cementitious Lining	Medium
381	Install Cementitious Lining, Replace F&C	Medium
382	Install Cementitious Lining	Medium
384	Install Cementitious Lining	Medium
387	Install Cementitious Lining	Medium
430	Seal Precast Joints, Reset Existing F&C	Medium

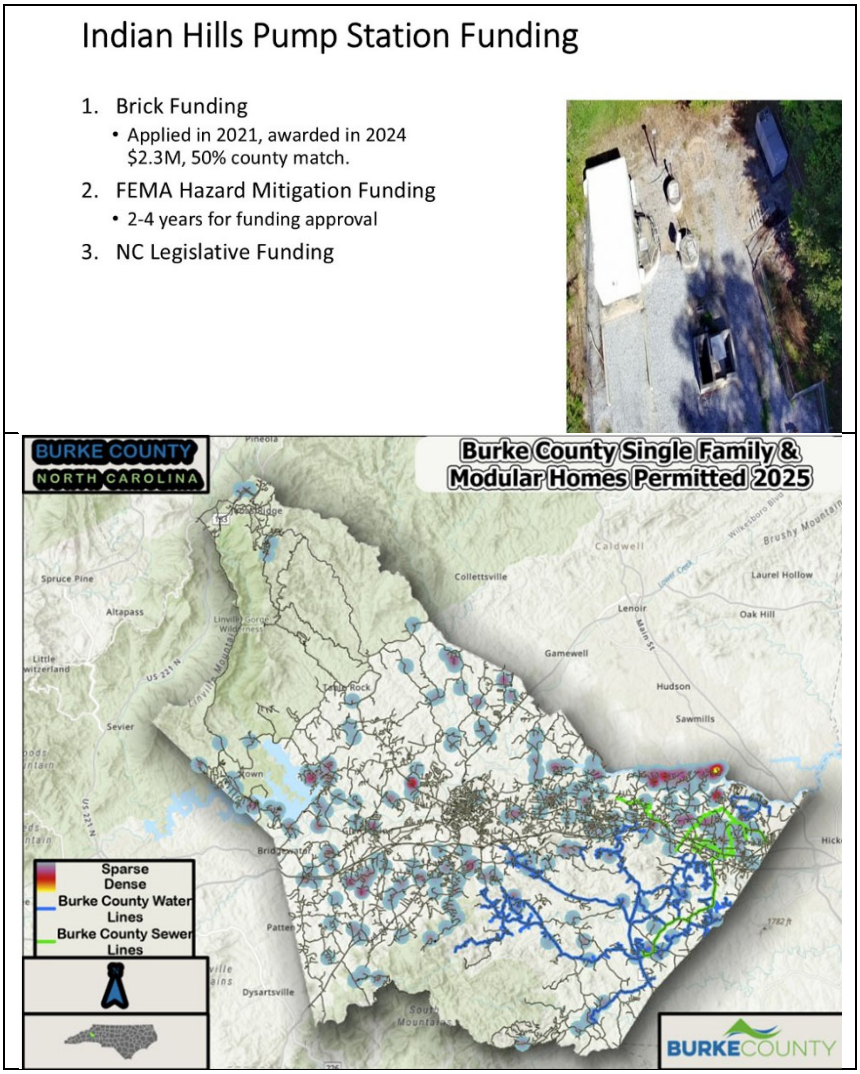
Address	Rehabilitation Recommendation	Priority
3450 Miller Bridge Rd, Connelly Springs	Remove abandoned line	High
Near MH 364 south of US 70	Replace missing cleanout in low lying area	High
232 Excelsior Drive, Rutherford College	Replace broken cleanout in low lying area	Medium
1031 Malcolm Blvd, Rutherford College	Replace broken cleanout in low lying area	Medium
3266 US 70, Hildebran	Replace broken cleanout in low lying area	Medium
3274 N. Maple St., Connelly Springs	Replace missing cleanout in low lying area	Medium
John Williams Rd, Connelly Springs	Replace broken cleanout in low lying area	Low
3653 Curleys Fish Camp Rd, Hildebran	Replace missing cleanout in low lying area	Low
3653 Curleys Fish Camp Rd, Hildebran	Replace missing cleanout in low lying area	Low
1 Jacquard Dr, Hildebran	Replace broken cleanout in low lying area	Low
3584 Curleys Fish Camp Rd, Hildebran	Replace broken cleanout in low lying area	Low
3540 Texs Fish Camp Rd, Connelly Springs	Replace broken cleanout in low lying area	Low
2082 US-70, Connelly Springs	Replace broken cleanout in low lying area	Low
101 Benfield Dr, Rutherford College	Replace broken cleanout in low lying area	Low
1111 Malcolm Blvd, Rutherford College	Replace broken cleanout in low lying area	Low
1111 Malcolm Blvd, Rutherford College	Replace broken cleanout in low lying area	Low
244 Excelsior Dr, Rutherford College	Replace missing cleanout in low lying area	Low
Icard Church of God Rd, Connelly Springs	Replace broken cleanout in low lying area	Low
232 Excelsior Dr, Rutherford College	Replace broken cleanout in low lying area	Low
232 Excelsior Dr, Rutherford College	Replace broken cleanout in low lying area	Low
27357280? Indian Hills Cir, Hickory	Replace missing cleanout in low lying area	Low
3540 Texs Fish Camp Rd, Connelly Springs	Concrete box - additional investigation	Low
3653 Curleys Fish Camp Rd, Hildebran	Seal grease trap	Low
3184 E. Burke Blvd, Connelly Springs	Roof downspout - additional investigation	Low

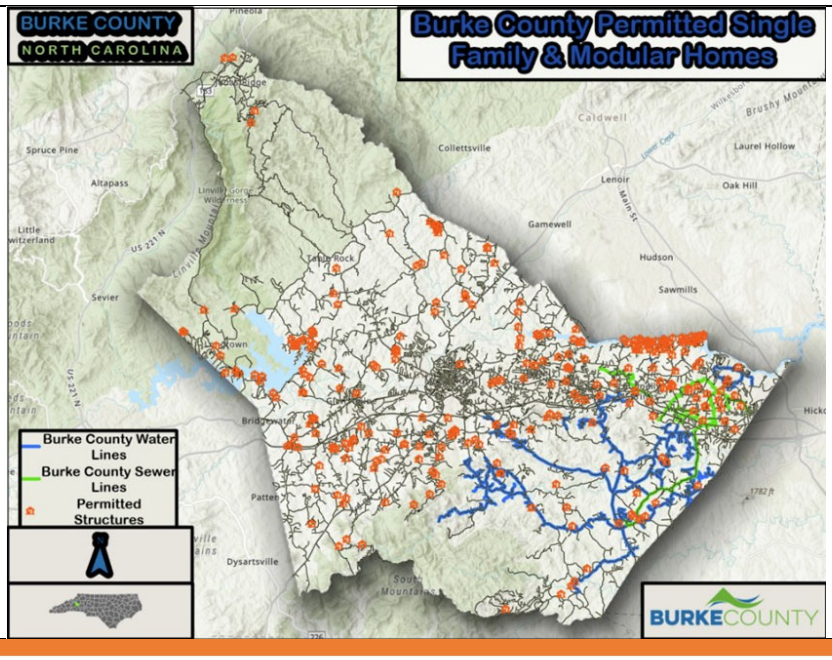
5-Year Capital Improvement Plan

Project	FY 26	FY 27	FY 28	FY 29	FY 30	Project Total
Wastewater Collection System						
1 Wastewater System Rehabilitation Project	150,000		150,000			300,000
2 Long-Term Meter Installation	350,000					350,000
3 Smoke Testing		40,000				40,000
4 Island Creek Pump Station and Force Main Improvements			3,500,000			3,500,000
5 Indian Hills Pump Station and Force Main					9,900,000	9,900,000
Water Distribution System						
6 Water System SCADA Improvements	230,000					
7 Booster Pump Station Pump Replacements		315,000				315,000
8 Interstate-40 Parallel Water Line			1,000,000			1,000,000
9 Hickory Interconnection Facilities				2,500,000		2,500,000
10 Methodist Park Road Water Line Replacement				890,000		890,000
Total Improvement Cost	730,000	355,000	4,650,000	3,390,000	9,900,000	19,025,000



Mr. Epley returned to the podium to conclude the presentation and presented the following information:



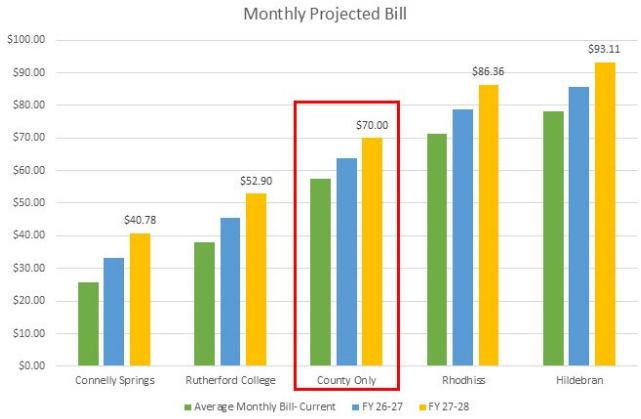


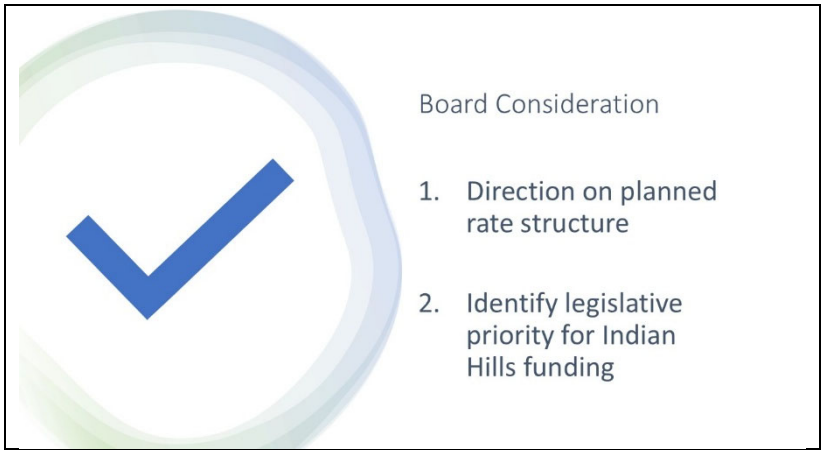
Proposed Sewer Rate Ladder

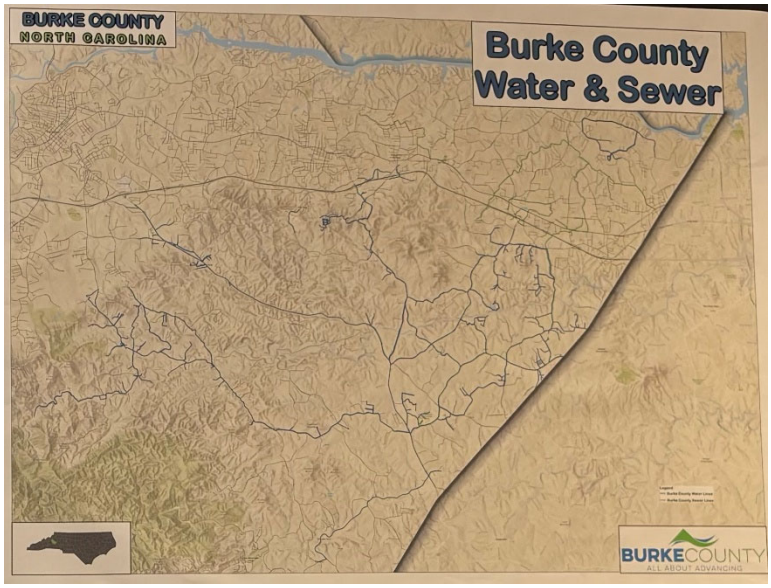
	Consumption Rate Per 1,000 Gallons		Projected Revenue		
	Municipal	Direct Consumer	Municipal	Direct Consumer	Total
FY 25-26-Current	$5.00	$6.50	$536,550	$129,575	$666,125
FY 26-27	$6.50	$7.25	$697,515	$187,884	$885,399
FY 27-28	$8.00	$8.00	$858,480	$207,320	$1,065,800

Consumer Rate Impact

- 5-year funding Impact: $1,998,375
- 5-year capital improvement needs, not including Indian Hills: $9,125,000







Chairman Brittain opened the floor for questions or comments. The discussion focused on billing practices, planned renovations to the Indian Hill Pump Station on the Hickory side of the system, and concerns about unaccounted-for wastewater. Questions arose on whether greater regional uniformity could be achieved in managing water and sewer systems. It was explained that repairs at the Indian Hill Pump Station could provide only a marginal increase in capacity at great expense of capital. An update was also provided on the development of GIS data tools that will allow for improved system monitoring and daily check-ins, which are currently in progress and will be shared with the Board once available. Questions were raised about whether connecting existing systems could shift load and improve capacity, but staff noted that while it could divert some demand, it would not significantly change overall capacity. Staff also highlighted a joint effort by Burke County and the Western Piedmont Council of Governments to pursue FEMA emergency preparedness grant funding to connect the Hickory and Morganton water systems. Such a connection would allow one system to support the other during emergencies, such as when Hurricane Helene caused outages affecting local infrastructure.

Note: The map (above) of the water and sewer infrastructure was displayed during the entirety of the presentation.

RECESS OF THE MEETING

Chairman Brittain called for a recess at 11:50 a.m. for lunch. The meeting resumes at 12:18 p.m.

CD - ANNUAL UPDATE, UDO PLANNING STRATEGY & NEXT STEPS

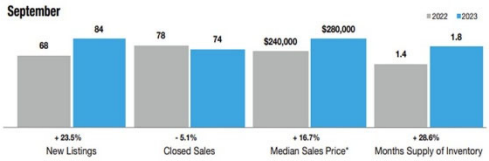
Brian Epley, County Manager, provided a brief refresher on the housing study conducted by the Bowen Institute, regulatory restriction challenges and a housing development opportunity as follows:

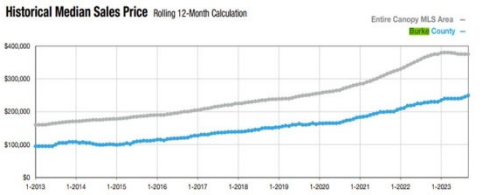




County Wide Housing Study

BOWEN NATIONAL RESEARCH





	September			Year to Date		
Key Metrics	2022	2023	Percent Change	Thru 9-2022	Thru 9-2023	Percent Change
New Listings	68	84	+ 23.5%	781	705	- 9.7%
Pending Sales	67	50	- 25.4%	691	622	- 10.0%
Closed Sales	78	74	- 5.1%	701	602	- 14.1%
Median Sales Price*	$240,000	$280,000	+ 16.7%	$233,000	$250,000	+ 7.3%
Average Sales Price*	$281,539	$341,292	+ 21.2%	$278,366	$304,427	+ 9.4%
Percent of Original List Price Received*	96.0%	96.6%	+ 0.6%	98.2%	96.2%	- 2.0%
List to Close	63	74	+ 17.5%	75	78	+ 4.0%
Days on Market Until Sale	20	35	+ 75.0%	26	33	+ 26.9%
Cumulative Days on Market Until Sale	20	35	+ 75.0%	25	38	+ 52.0%
Average List Price	$338,964	$301,317	- 11.1%	$311,816	$324,483	+ 4.1%
Inventory of Homes for Sale	111	118	+ 6.3%	--	--	--
Months Supply of Inventory	1.4	1.8	+ 28.6%	--	--	--

Burke County

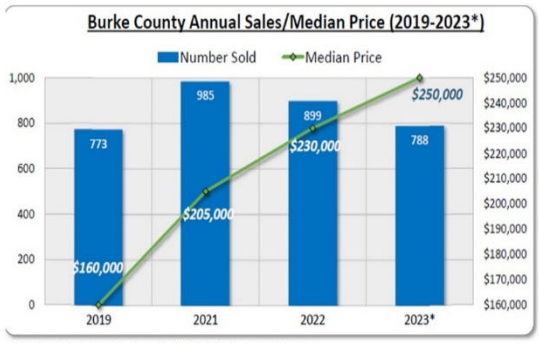
North Carolina

MLS Data

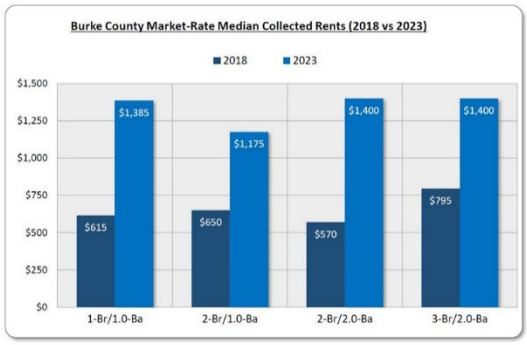
	March			Year to Date		
Key Metrics	2023	2024	Percent Change	Thru 3-2023	Thru 3-2024	Percent Change
New Listings	97	**106**	+ 9.3%	229	**266**	+ 16.2%
Pending Sales	88	**88**	0.0%	216	**217**	+ 0.5%
Closed Sales	76	**63**	- 17.1%	167	**160**	- 4.2%
Median Sales Price*	$233,825	**$270,000**	+ 15.5%	$245,000	**$240,000**	- 2.0%
Average Sales Price*	$266,269	**$277,723**	+ 4.3%	$286,222	**$275,528**	- 3.7%
Percent of Original List Price Received*	95.4%	**95.0%**	- 0.4%	95.4%	**93.9%**	- 1.6%
List to Close	93	**79**	- 15.1%	88	**82**	- 6.8%
Days on Market Until Sale	36	**38**	+ 5.6%	40	**41**	+ 2.5%
Cumulative Days on Market Until Sale	41	**41**	0.0%	45	**44**	- 2.2%
Average List Price	$326,943	**$403,223**	+ 23.3%	$315,098	**$357,859**	+ 13.6%
Inventory of Homes for Sale	107	**158**	+ 47.7%	--	--	--
Months Supply of Inventory	1.6	**2.4**	+ 50.0%	--	--	--

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

COST OF HOUSING CHANGE



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



Housing Gap Estimates (Rental Housing)

Burke County has an **Overall Rental Housing Gap** of **Approximately 1,499 Residential Units** at a **Variety of Affordability Levels.**

	Burke County, North Carolina Rental 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+**
Monthly Rent Range	**≤ $891**	**$892-$1,426**	**$1,427-$2,142**	**$2,143+**
Household Growth	-336	62	131	99
Balanced Market	206	0	33	46
Replacement Housing	507	119	31	14
External Market Support	167	158	83	72
Severe Cost Burdened	273	137	46	0
Step-Down Support	95	2	-5	-92
Less Pipeline Units	-78	-151	-120	0
Overall Units Needed	**834**	**327**	**199**	**139**

The greatest rental housing gap is for units with rents ≤ $891 for households generally earning <$35,650 annually.

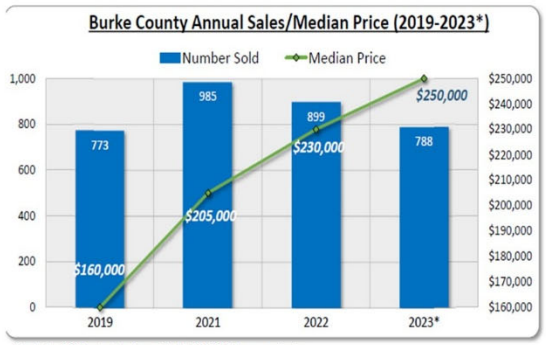
Housing Gap Estimates (For-Sale Housing)

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

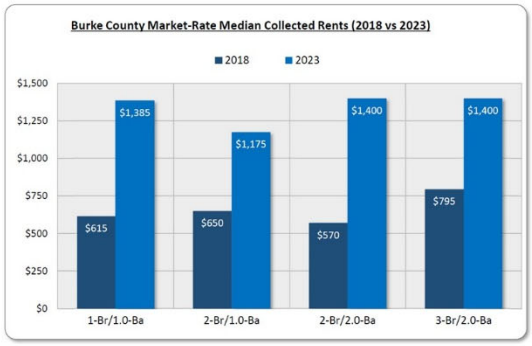
	Burke County, North Carolina For-Sale Housing Gap Estimates (2023-2028)			
Percent of Median Income	**≤ 50%**	**51%-80%**	**81%-120%**	**121%+**
Household Income Range	**≤$35,650**	**$35,651-$57,040**	**$57,041-$85,680**	**$85,681+**
Price Point	**≤ $118,833**	**$118,834-$190,133**	**$190,134-$285,600**	**$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.

COST OF HOUSING CHANGE



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

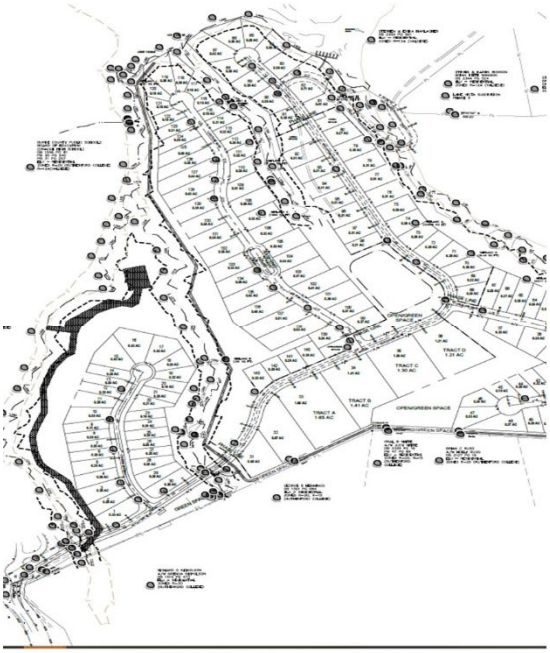


Housing Inducement Strategies

- Water / Sewer Infrastructure Investments
  - County System AIA Studies
  - Housing Inducement Fund
    - $3.25M (Directed General Assembly Grant to Burke County)
      - Utilized through municipal grant partnerships
        - » IE. Valdese Bluffs Development Agreement

- Regulatory Environment Review





Project Overview:

- 140 single-family residential lots
- Average home value: $350,000
- Estimated total tax base at buildout: $49,000,000

- Public Infrastructure:
  - Town to construct pump station and sewer force main
    - $1.75M
      - 2021 $850k SCIG Grant to Town of Valdese
      - 2026 (50/50) Split
        - » County – Housing Inducement Fund

- Financial Impact (County):
  - Estimated annual revenue at full buildout: $274,400
  - Performance payments protect public investment
  - Strengthens long-term tax base growth

Valdese Bluffs Development Agreement – Phase I

Performance Standards:
- Minimum 27 residential dwellings completed
- Completion required within 3 years after Sewer Availability Date
- Average assessed value target: $350,000 per dwelling

Claw-back Provisions:
- $14,440.87 per unit (to each Local Government) for each unit below 27
- $250 per $50,000 (or fraction) below $350,000 assessed value (County only)
- Vacant lots assessed at 72 months after Sewer Availability Date
- Deed of Trust recorded to secure payments
- Permits/Certificates of Occupancy may be withheld upon default
- Foreclosure remedies available if unpaid

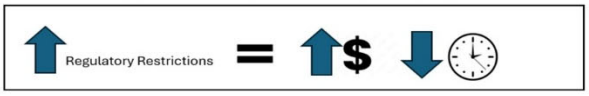


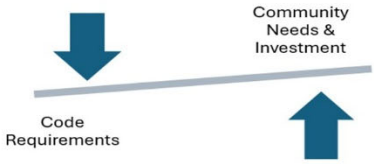
Bradley Kirkley, Interim Planning Director, and Patrick Diskinson, Planner, presented information about the current state of Burke County's regulatory environment and the plan work towards a unified development ordinance (UDO). Highlights of their presentation were as follows:

Regulatory Environment

By reducing unnecessary hurdles for homeowners and continuing to modernize our development standards, we are actively positioning Burke County as a "community of choice" where regulations facilitate the ability to live, work, and play.

An "overly regulated land use policy" refers to a set of rules governing how land can be developed that are excessively restrictive, often leading to limited housing supply, higher property prices, and hindering economic growth by placing too many constraints on what can be built where, potentially impeding development and innovation in a given area.





Zoning Amendment Timeline

What we've completed so far:

- **Zoning Ord. Overhaul (Completed 2021)-** Compliance with NCGS 160D, moving towards modern UDO (unified development ordinance).
- **ZTA 2024-01:** Introduction of conditional zoning, allowing for greater community input, flexible design standards, and mixed-use developments.
- **ZTA 2025-01**: Reduced lot sizes and changes to formatting to formulate a unified development ordinance.
- **ZTA 2025-02:** Reduced regulations for ADUs, provide options for accessory structures, streamlined MHP regulations, added options for residential and commercial "special developments" , and state statue compliance.



Where we are headed:

- **Hobby Farm & Chicken Keeping:** Exploring options for introducing hobby farms and chicken keeping into our zoning ordinance.
- **Subdivision Ord. Revision-** Updating road standards and minor/major subdivision criteria.
- **END GOAL: Unified Development Ordinance**

BURKECOUNTY

Data from 2025

BUILDING PERMITS	NEW HOME PERMITS	ZONING PERMITS	PLAT MAP REVIEWS
• 2024 TOTAL: 2283	• 2024 TOTAL: 251	• 2024 TOTAL: 1268	• 2024 TOTAL: 69
• 2025 TOTAL: 2813	• 2025 TOTAL: 401	• 2025 TOTAL: 1397	• 2025 TOTAL: 134
• UP 22.1%	• UP 59.76%	• UP 10.2%	• UP 131%

2026 TRENDS





BURKECOUNTY

Our Community Contracts





- Community Development administers zoning for Glen Alpine & Connelly Springs
- Each municipality has their own zoning ordinance that regulates their land uses
- Recently completed an overhaul to the Glen Alpine Zoning Ordinance.
- As of Jan 1, 2026, Community Development reviews all plats submitted in Burke before heading to deeds for recording (after applicable municipality signs off for zoning and subdivision standards)

What Governs Our Work

Zoning Ordinance
- Establishes land use regulations such as residential, commercial, or industrial zoning.
- What it controls: Zoning, how tall buildings can be, how far a house must be from the street (setbacks), parking, signs, etc.

Watershed Protection Ordinance
- Protects our drinking water resources by limiting the amount of impervious surface (pavement & roofs).
- When precipitation runs-off impervious surfaces it picks up pollutants (oil, fertilizer, trash etc.) which then pollutes our lakes and rivers.

Subdivision Ordinance
- Regulates how a single large piece of land is split into smaller lots.
- Regulates that all subdivisions provide adequate roads, water and sewer access, and flood protections.

Flood Damage Prevention Ordinance
- What it controls: It requires buildings in high-risk areas to be elevated above a certain flood level.
- FEMA manages flood maps that designate properties this ordinance applies to.

BURKECOUNTY

RECENT ZONING UPDATES:



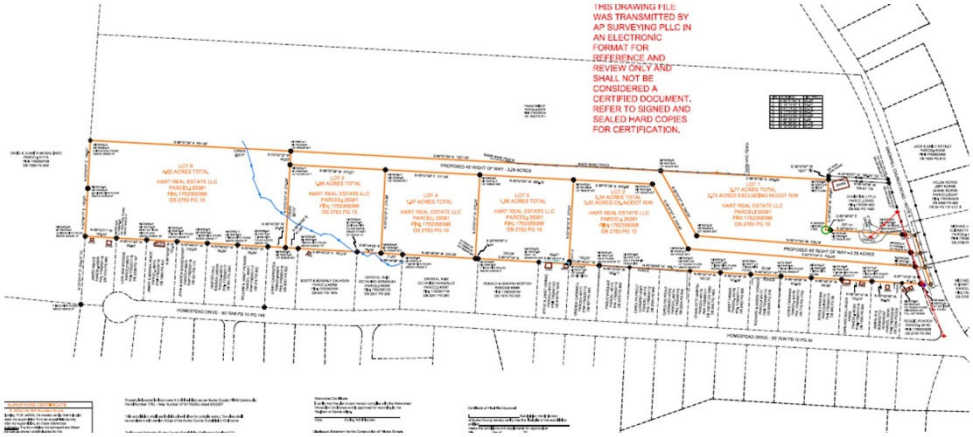
1. INCREASE IN SQ. FOOTAGE FOR ACCESSORY DWELLING UNITS
2. SCALE CHANGES FOR ACCESSORY STRUCUTRES
3. SOLAR FARM ALLOWANCES
4. TINY HOMES DEFINED- APPENDIX Q RULE
5. MINIMUM LOT SIZE- LOWERED ACERAGE

BURKECOUNTY

Updating the Subdivision Ordinance

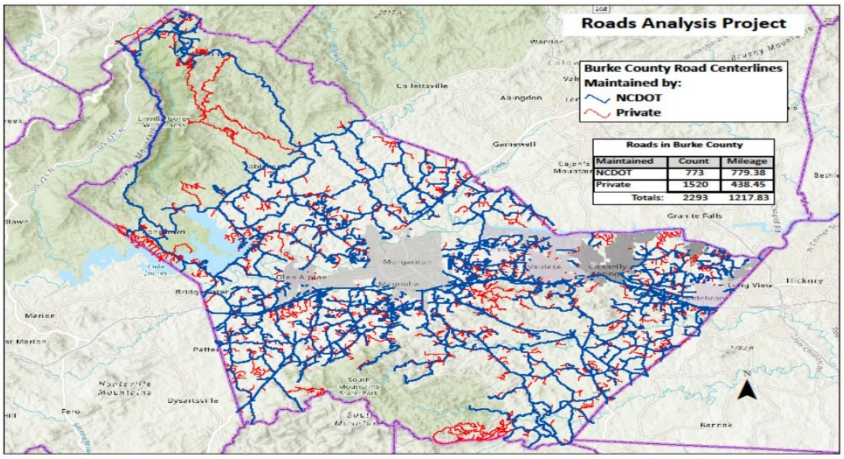
- Currently Burke County is operating off a subdivision ordinance that was adopted over 20+ years ago.
- Community Development has identified priority areas of improvement:
  - **Road standards:**
    - Currently, any subdivision with greater than 6 lots must build a road to NCDOT standards.
    - For previously existing subdivisions with nonconforming roads (dirt, gravel, or small right of way) further subdivision is strangled as the entire road must be brought up to NCDOT standards after 6 lots are served.
  - **Revising Minor VS. Major Subdivision Criteria:**
    - Minor subdivisions (6 or less lots) do not require NCDOT standard roads and internal plat review.
    - Major subdivisions (7 or more) require NCDOT standard road, and reviews internally and by the planning board.
    - Many developers are choosing to do just six lots due do this increasingly costly requirement= less housing and more sprawl.
      - For our typical 10-20 lot major subdivision, this requirement can add ~$10,000 more per lot.

BURKECOUNTY

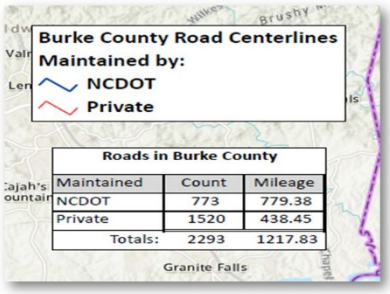


Note the subdivision from the 1990's on the south side is much denser for the same area of land

ROAD ANALYSIS PROJECT



Road Analysis Project



Roads in Burke County

Maintained	Count	Mileage
NCDOT	773	779.38
Private	1520	438.45
Totals:	2293	1217.83

- Community Development & GIS/Mapping went across the county and physically inspected, measured and photographed **10% (162) of our private roads.**
- The study found a clear link between surface material and its condition, with **asphalt roads** averaging the highest score **(3.41)**, followed by **gravel (2.75)**, and **dirt** roads performing the worst with an average score of **1.89.**
- Across the 162 rated roads, **the average score was 3.03**, which falls into the "fair" category. The **most frequent rating** assigned was a score of **3 (75 roads).**
- Road surface also influenced accessibility; **asphalt roads were the widest on average at 14.93 feet, while gravel and dirt roads were narrower, measuring 12.71 feet and 12.33 feet respectively.**

BURKECOUNTY



Road serves 22 lots



Road serves 30 lots



Serves 50 lots secondary access impassable

2. The sub-divider shall provide proof that the private right-of-way existed prior to September 15, 1998 by providing on the final plat a dated deed book page and reference (recorded by the Burke County Register of Deeds) identifying the right-of-way or by providing a notarized and sworn affidavit by the affected or past property owners to this effect.

3. Only one (1) private road that is not eligible for maintenance by NC DOT is allowed on each tax parcel of land existing as of the adoption date of this ordinance (September 15, 1998).

4. No more than six (6) lots may be served by a private road not constructed to NC DOT standards.

BURKECOUNTY



BURKECOUNTY

What do you think?

We have reduced lot size and frontage requirements, but the factor of paved roads continues to be **THE** limiting factor of residential development other than utility availability.

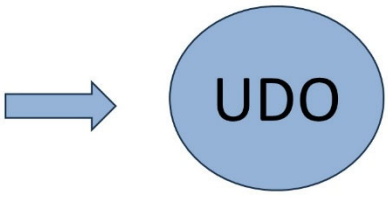
Which leads us to these questions; we want to hear your thoughts!

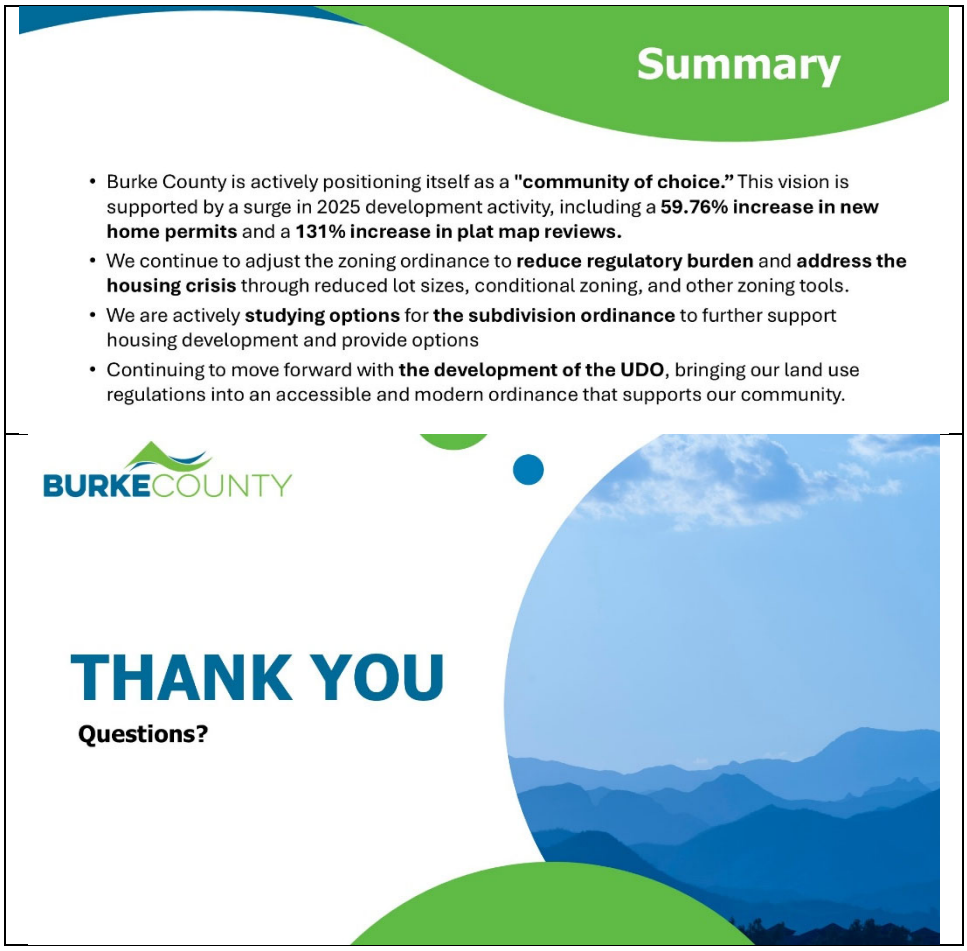
- **Since NCDOT is very reluctant to take over private roads- should we require paved, NCDOT standard roads for *all* major subdivisions?**
- **What number of lots are we comfortable serving with gravel roads?**
- **How to we address nonconforming private roadways that are preventing further subdivision after the road has maxed out lots?**

Unified Development Ordinance

- **Once the subdivision ordinance is adopted, it will be added to the zoning ordinance, continuing our work towards a unified development ordinance.**
- **Single Regulatory Framework:** Consolidates land use regulations into a "one-stop shop" for developers, residents, and staff.
- **Consistent Standards:** Eliminates internal conflicts between separate ordinances (e.g., ensuring landscaping requirements in zoning don't clash with subdivision road standards).
- **User-Friendly Design:** Typically features more tables, graphics, and cross-references than traditional legacy codes to make regulations easier to interpret and promote transparency.

Ordinance	Primary Goal	Focus Area
Zoning	Compatibility	Land use and building size
Subdivision	Infrastructure	Streets, lots, and utilities
Watershed	Water Quality	Pollutants and pavement limits
Flood Damage	Public Safety	Elevation and floodplains

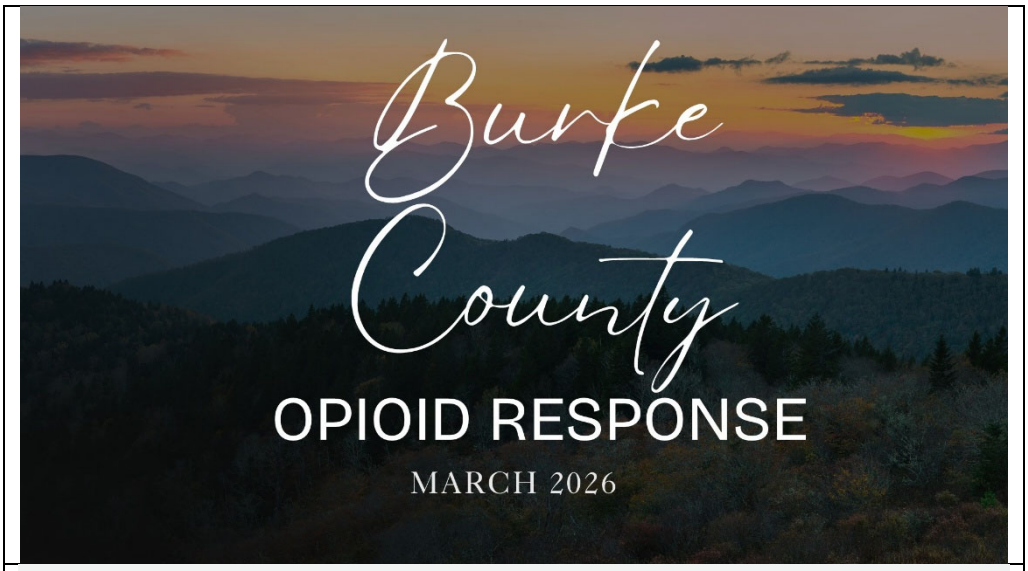




Chairman Brittain opened the floor for questions or comments. Mr. Epley, Mr. Kirkley and Mr. Dickinson responded to several questions from the Board. During the discussion, staff reported that research is underway comparing road standards and subdivision regulations in peer counties, particularly regarding thresholds for major versus minor subdivisions and allowable road types. It was noted that standards vary widely across jurisdictions, but generally six (6) lots may be too few to require upgraded road standards, while more than 20 lots may be too many to allow a gravel road. Discussion also touched on situations where multiple homes share a private road and the responsibility of the property owners to maintain or pave it. Commissioners discussed the County's potential role in facilitating easements and ensuring that maintenance agreements for private roads are properly recorded and legally enforceable, so there is recourse if maintenance obligations are not met. Staff emphasized that existing road regulations are largely driven by public safety concerns, particularly ensuring adequate access for emergency vehicles such as ambulances and fire trucks. Additional considerations include the amount of traffic different road types—dirt, gravel, or paved—can safely accommodate. Staff indicated that a proposal or recommendations related to these issues could be brought before the Board for consideration later in the summer.

OR - OPIOID SETTLEMENT REPORT AND BUDGET

Dr. Katie Samuel, Opioid Settlement Coordinator, presented the Opioid Settlement Report as follows:



THE PLAN

Current Landscape
A high-level review of local opioid impact indicators and an overview of settlement funds received, allocated, and remaining to guide strategic decision-making.

County-Led Strategy Updates
Update on department operations, BEAR Team activity, and system coordination efforts.

Provider-Led Strategy Updates
Highlights from funded partners on services delivered and early outcomes.

Moving Forward in FY26-27
Discussion of a proposed continuation plan to sustain current operations and provider contracts, while advancing new initiatives including the launch of the Facility-Based Crisis Center and other strategic investments.

PURPOSE & VALUES

Improving Lives in Burke County

SERVICE | SUPPORT | ENHANCEMENT

Empathy: We treat all people with fairness, respect, and kindness; we encourage diverse perspectives.

Teamwork: We prioritize shared goals and belive we can achieve more when we work together.

Accountability: We can communicate openly and honestly with employees and stakeholders. We have integrity to do what is right.

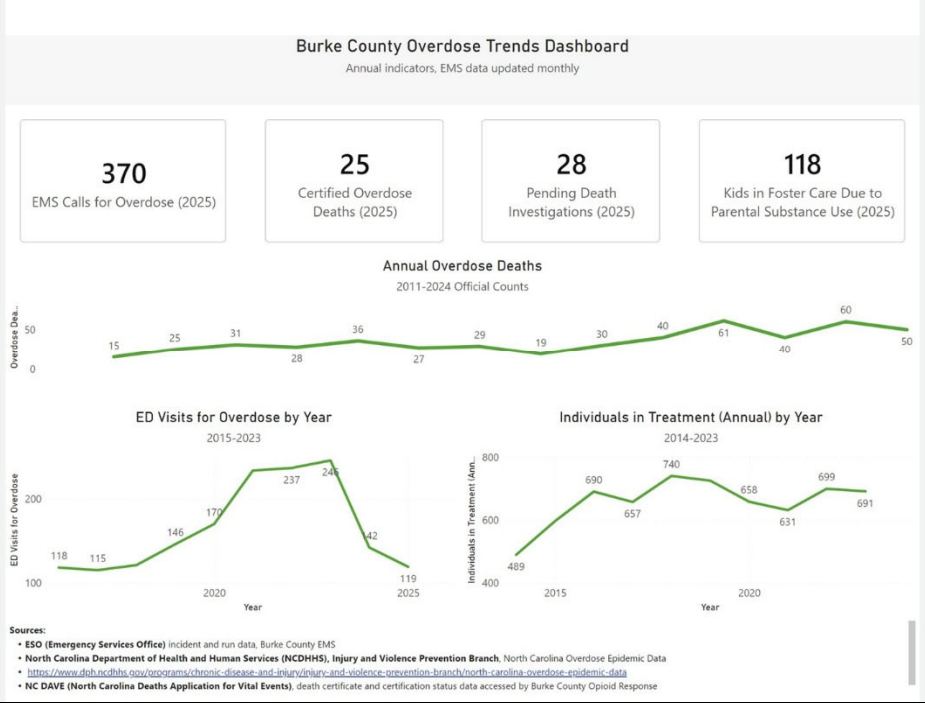
Performance: We are focused on innovation, efficiency, and measured outcomes. We strive for a high-quality customer experience.

Growth: We support and invest in the advancement of our team and prioritize professional development.

Focus Area 3: Public Safety & Wellness

Focus Areas:

1. Reduce On-set of New Use
2. Enhance Pathways to Recovery
3. Reduce Fatalities



Burke County's Approach

DEDICATED OPIOID RESPONSE DEPARTMENT

A specialized county team focused on overdose prevention, follow-up, and coordination of opioid response strategies.

COMMISSIONER-LED GOVERNANCE

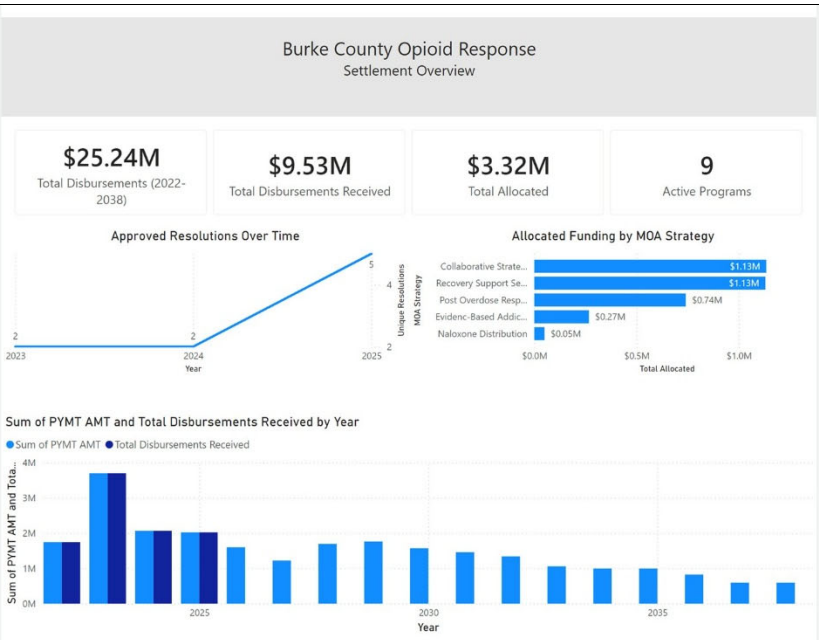
Settlement funding decisions are guided by the Burke County Board of Commissioners to ensure alignment with county priorities and public accountability.

OPIOID ADVISORY COMMITTEE

A commissioner-appoiinted advisory group reviews strategies, progress, and recommendations to support informed decision making.

DATA-DRIVEN DECISION MAKING

Local data, trends, and performance measures inform funding priorities, program design, and ongoing adjustments.



CURRENT PROGRAMS

There are currently 9 active programs funded through Opioid Settlement dollars.

OPIOID RESPONSE DEPARTMENT	NALOXONE DISTRIBUTION
BEAR TEAM	BURKE COUNTY RECOVERY COURT
LOW-BARRIER MAT	FAMILY CENTERED TREATMENT-RECOVERY (FCT-R)
SACOT/SAIOP	COMMUNITY NAVIGATOR

COUNTY-LED STRATEGIES

Opioid Response Department & Naloxone Distribution

The Opioid Response Department coordinates Burke County's overdose prevention and response efforts through the BEAR Team, Post-Overdose outreach, and countywide naloxone distribution. By managing settlement funds strategically and strengthening partnerships across public safety, healthcare, and community providers, the department ensures rapid response to overdoses, improved linkage to treatment, and expanded access to lifesaving resources.



Strategy Management & Reporting

Oversees opioid settlement funding, contract performance, and compliance with state requirements while providing transparent reporting to the Board of Commissioners and Advisory Committee. Ensures investments are data-driven, measurable, and aligned with long-term sustainability.



Community Engagement & Education

Builds partnerships across public safety, healthcare, schools, and community organizations to strengthen coordination and reduce stigma. Leads outreach efforts that connect residents to treatment, recovery resources, and prevention initiatives.



Naloxone Distribution

Coordinates countywide distribution of naloxone and overdose prevention training to expand community-level response capacity. Ensures lifesaving medication is accessible in high-risk settings to reduce overdose fatalities.

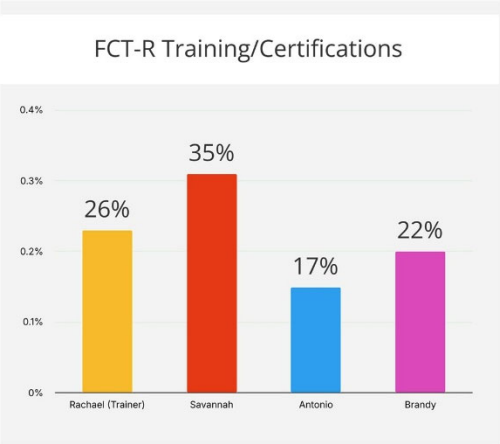


Teri Hermann, Senior VP of Strategy and Development, and Faren Tillery, FCT/FCT-R Supervisor, Spark, presented an update on provider lead treatment initiatives as follows:

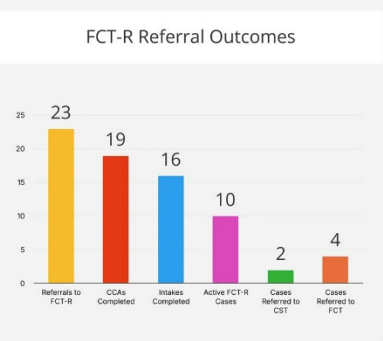


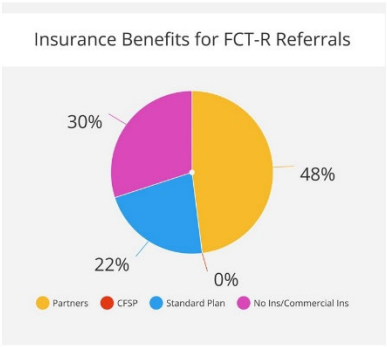
FCT-R Program Update

- **Implementation Milestone:** FCT-R Readiness Assessment with FCT Foundation
  - Completed Aug 22nd with 90% of Best Practice Implementation Drivers as in place/partially in place prior to program launch
- **Implementation Milestone:** Service Delivery
  - 1st referral received October 3, 2025
  - 23 total referrals to FCT-R received to date



Family Centered Treatment- Recovery (FCT-R)



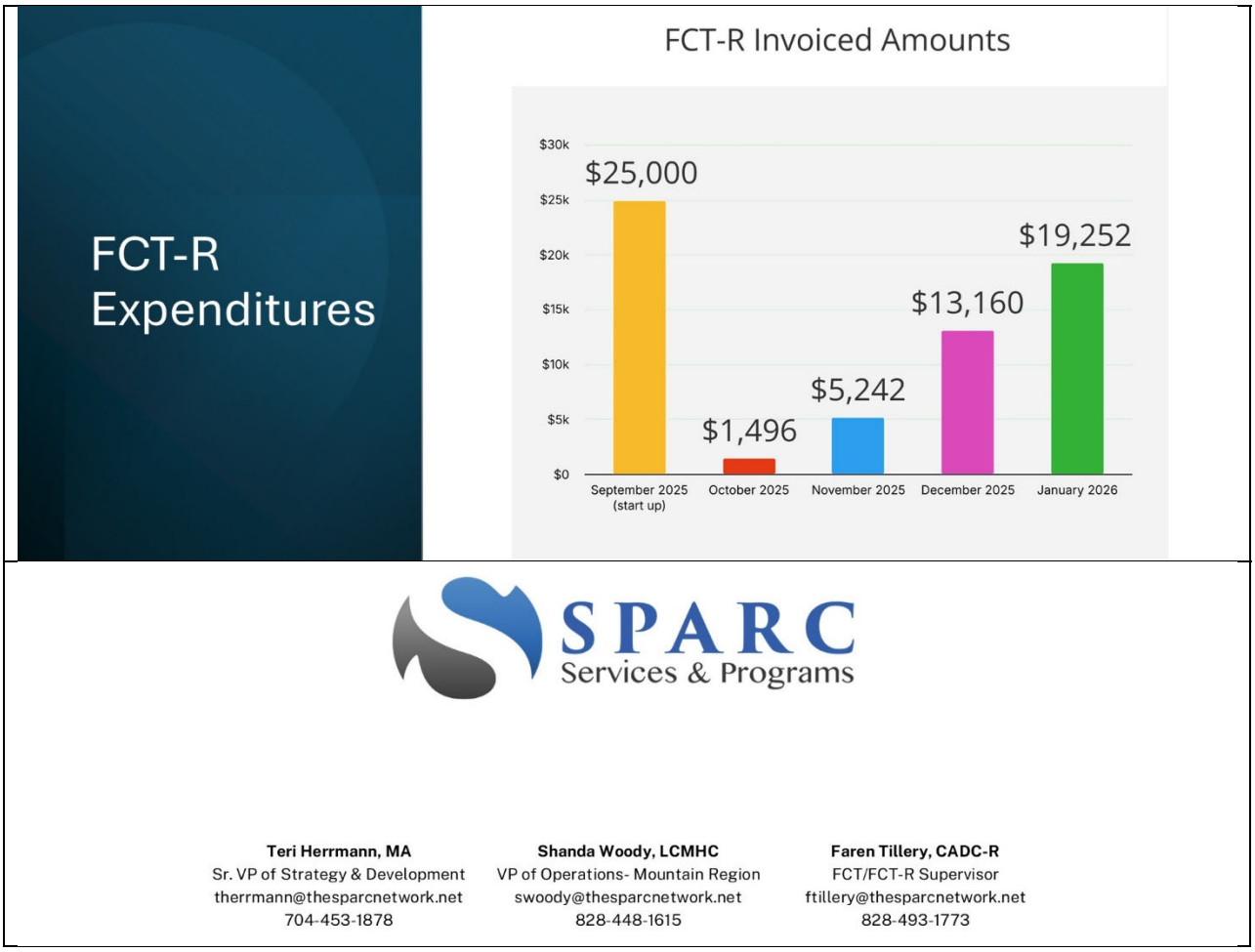


Family Engagement in FCT-R









Dr. Meek, High County Community Health, presented an update of provide led initiatives as follows:



Outreach Services

HCCH provides outreach to patients who are not able to receive services in an outpatient clinic by bringing the providers to the patient.

Outreach provides access to medications for opioid use disorder, supplies for safer use, access to Narcan, HIV and HEP C testing, wound care and other medical treatments and prescriptions.

Access to psychiatric care, peer support services, linkage to detox, and higher levels of care are also available during outreach. Behavioral/Mental health available PRN.

Since January 2025, HCCH has engaged 227 patients in outreach services through Burke and McDowell counties combined.

High Country Community Health 2025

Total unique MOUD patients seen in 2025 in Burke including outreach patients- 697

Total unique MOUD patients in Burke county outreach in 2025- 15

Total unique outreach/medical patients in Burke county outreach in 2025- 11

High Country Community Health 2026

Total unique MOUD patients seen in 2026 in Burke including outreach patients- 426

Total unique MOUD patients in Burke county outreach in 2026- 11

Total unique outreach/medical patients in Burke county outreach in 2026- 8

Who Are We Seeing?

Demographics

Gender	Age	Race	Satisfaction
Male - 389	18-24: 11	African American - 16	100% reported satisfaction
Female - 308	25-34: 141	White - 668	71% report higher support
	35-44: 288	African - 1	
	45-54: 160	American Indian - 1	
	55-64: 73	Declined - 4	
	65+: 24	Other - 7	

MAT – what are we talking about ?

Medication Assisted Treatment

- OUD – Opioid Use Disorder (MOUD)
- Methamphetamine
- AUD – Alcohol Use Disorder
- …..Cocaine…. Cannabis…
- Poly Substance Use D/o
- Nicotine Dependence

MATTTTTTT[8]

- [1]Medication Assisted **T**reatment (SUD) – ALL of our Providers x7
- [2]**T**x Comorbidities – Psychiatric / BH Dx
- [3]**T**esting and tx Hepatitis & sequelae – Cirrhosis, CPS, Cutaneous issues, Dental, Endocarditis, HTN, HLD, DM
- [4]**T**herapy – BHT, LCSW, LCAT (CBT, DBT, EMDR)
- [5]**T**ackling SDoH – PRS – housing,transportation, access to INS
- [6]**T**hinking Outside the Box….Out Reach – NP, PNP, PSS (HCCH)
- [7]**T**eaming Up…(ACA, BUCM, Burke Recovery, BCHD, BCEMS – BEAR / CP, UNCBR)

MATTTTTTT[8]

- [1]Medication Assisted **T**reatment (SUD) – ALL of our Providers x7
- [2]**T**x Comorbidities – Psychiatric / BH Dx
- [3]**T**esting and tx Hepatitis & sequelae – Cirrhosis, CPS, Cutaneous issues, Dental, Endocarditis, HTN, HLD, DM
- [4]**T**herapy – BHT, LCSW, LCAT – PTSD* (CBT, DBT, EMDR)
- [5]**T**ackling SDoH - PRS
- [6]**T**hinking Outside the Box….Out Reach – NP, PNP, PSS (HCCH)
- [7]**T**eaming Up…(ACA, BUCM, Burke Recovery, Flynn Home, BCHD, BCEMS, UNCBR, BCEMS)
- [8] ***Transformation***





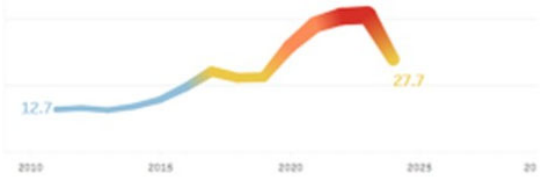
Building a Better Butterfly Net...

North Carolina

- Significant decrease first noted in 2024
- Continues to decline!
  Considered to be multifactorial
- Fentanyl-positive deaths declining when compared to 2024

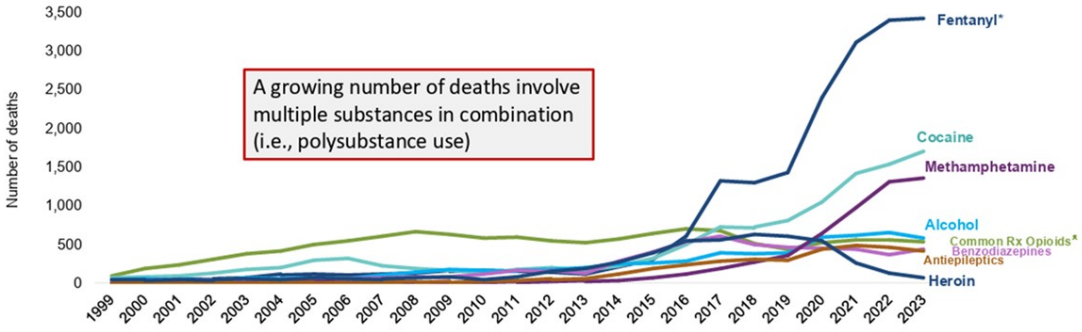
Overdose Deaths

The estimated Overdose Death rate in NC is 27.7 out of 100,000 residents in 2024, representing (projected) 3,060 people who died of an overdose.



NC Department of Health and Human Services, 2025

Illicitly manufactured fentanyl* remains the main contributor to overdose deaths



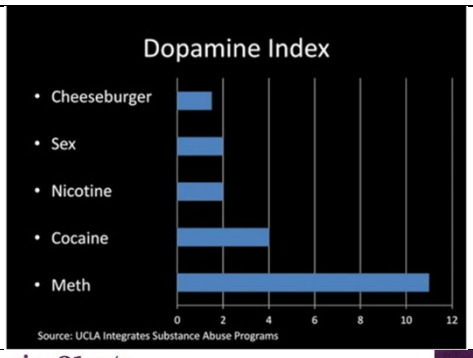
*Fentanyl surveillance based on Other Synthetic Narcotics (T40.4), which consists of mainly illicitly manufactured fentanyl and fentanyl analogues
•Commonly Prescribed Opioid Medications

Technical Notes: These counts are not mutually exclusive; If the death involved multiple substances, it can be counted on multiple lines; Toxicology data is unable to distinguish whether the presence of multiple substances indicate intentional polysubstance use or if one substance was tainted with other drugs (e.g. cocaine laced with fentanyl); All intent medication, drug, alcohol poisoning: X40-X45, X60-64, Y10-Y14, X85 with any mention of specific T-codes by drug type; limited to NC residents
Source: Deaths-NC State Center for Health Statistics, Vital Statistics, 1999-2023
Analysis by Injury Epidemiology and Surveillance Unit

Michael 39 y/o

- FENTANYL OD Feb 5th
- – EMS response successfully resuscitated
- –Est w/ BEAR team - PSS
- —Est w/ HCCH Feb 6th

Sustained engagement in Tx w/ f/u w/ weekly OV x 3

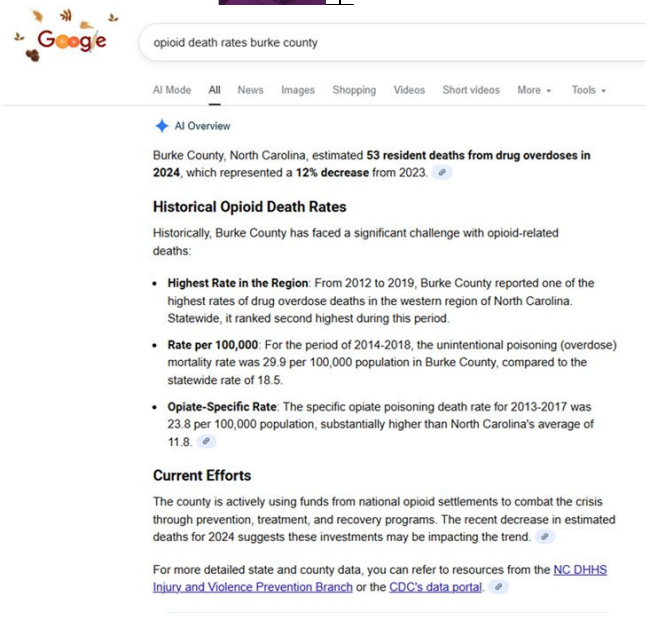


Kevin 30 y/o

Mth induced psychosis / Schizoaffective d/o, Homeless
—Multiple recurrent ED eval / Hospitalizations
—- Hyperutilizer of services
—-- collaborative efforts - APS / CP
—--- est w/ furnished housing, transportation to HCCH
—---- 2/24 UDS NEGATIVE, LAI Antipsychotic Rx, BHT
—-----3/3 UDS NEGATIVE, BHT, PNP

Jessica 21 y/o

- 31 weeks pregant
- Hx Mth / Fent use
- PTSD
- —est care Jan 29 (+) UDS
- — Est MAT/BHT/ OB / Housing
- —seen f/u Feb 19
- — UDS(+) Rx only

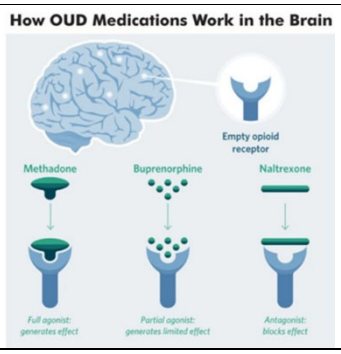


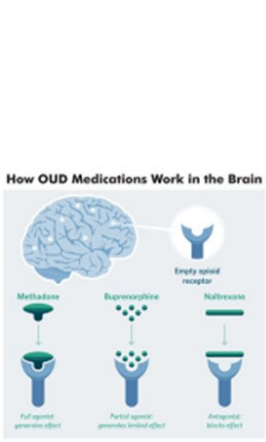
MAT – what are we talking about ?

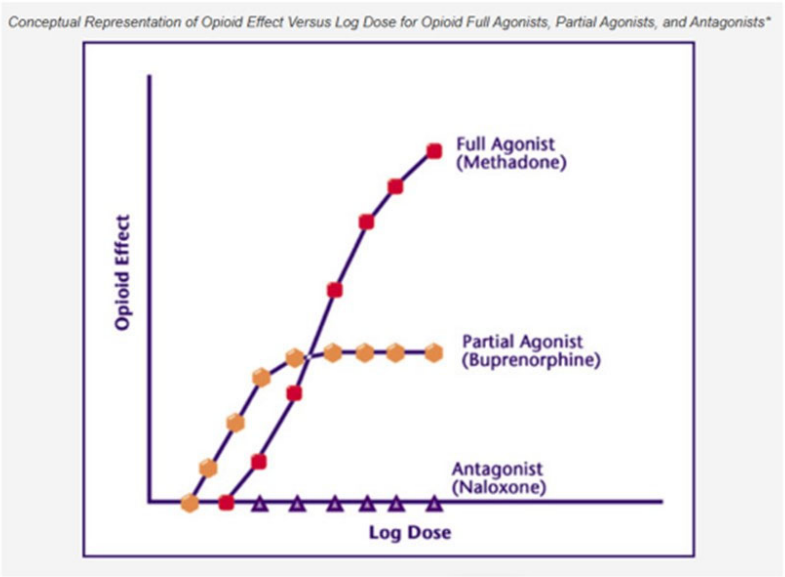
Medications used to mimic / reproduce the mechanism of action of specific agents used in addictive patterns of behavior - in a controlled dosage that does not cause impairment, reduces harm (*), improves functionality (Buprenorphine, Varenicline)

Meds used to block the MOA (Naltrexone)

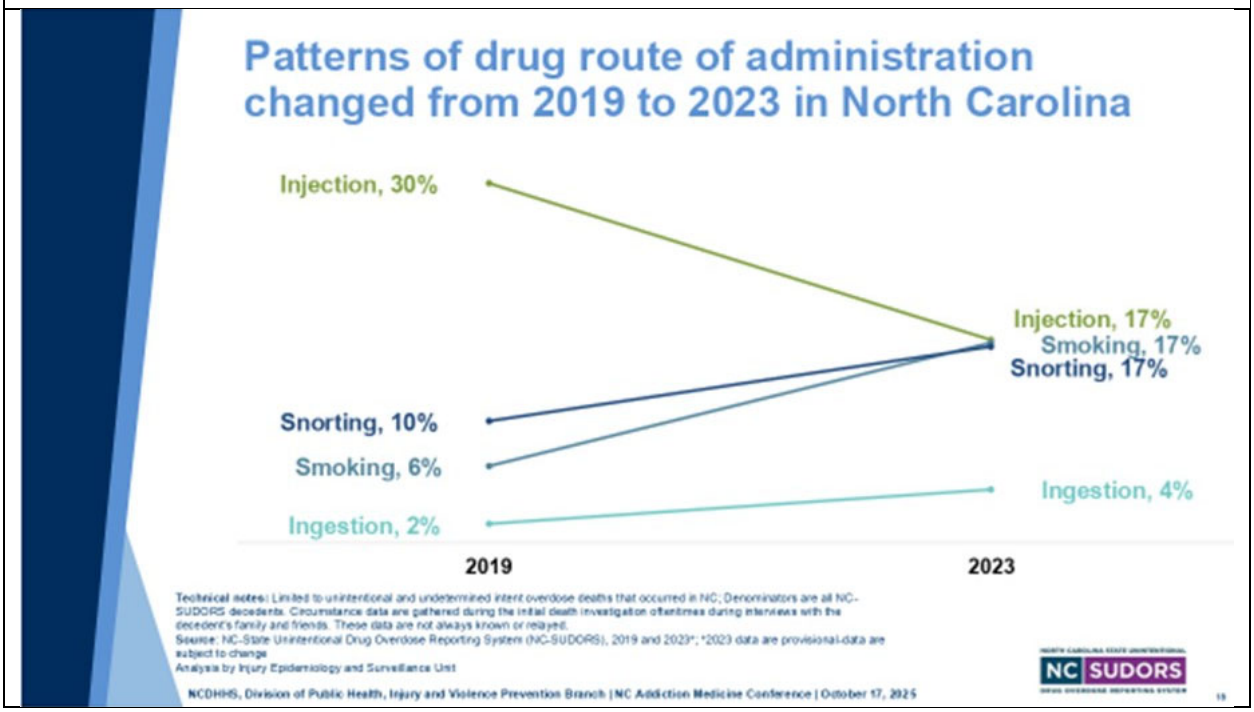
Meds used to diminish craving, reduce use (Buprenorphine, Varenicline, Naltrexone)







https://www.naabt.org/education/technical_explanation_buprenorphine.cfm



Teagan Brown, Chief Operating Officer, and Renee Brackett, Director of Adult Services, A Caring Alternative, presented an update on provider-led treatment initiatives as follows:



A Caring Alternative

SHAPING THE FUTURE OF SA Services in Burke County

Burke Opioid Update March 5, 2026

Facility

301 EAST MEETING ST
MORGANTON
suite 102
(OFFICE)828-608-3644
(CRISIS)828-807-4691

- Location secured
- Location operationally ready for services

- License obtained from the state review
- Awaiting MCO approval
- Expected in 2 weeks

MARKETING

TASC
Recovery Court
BEAR
PORT
Burke Recovery
community sa/mh providers
community hospitals
High county community health (referrals and Mat)
millenium labs
burke county custody and prison

STAFFING

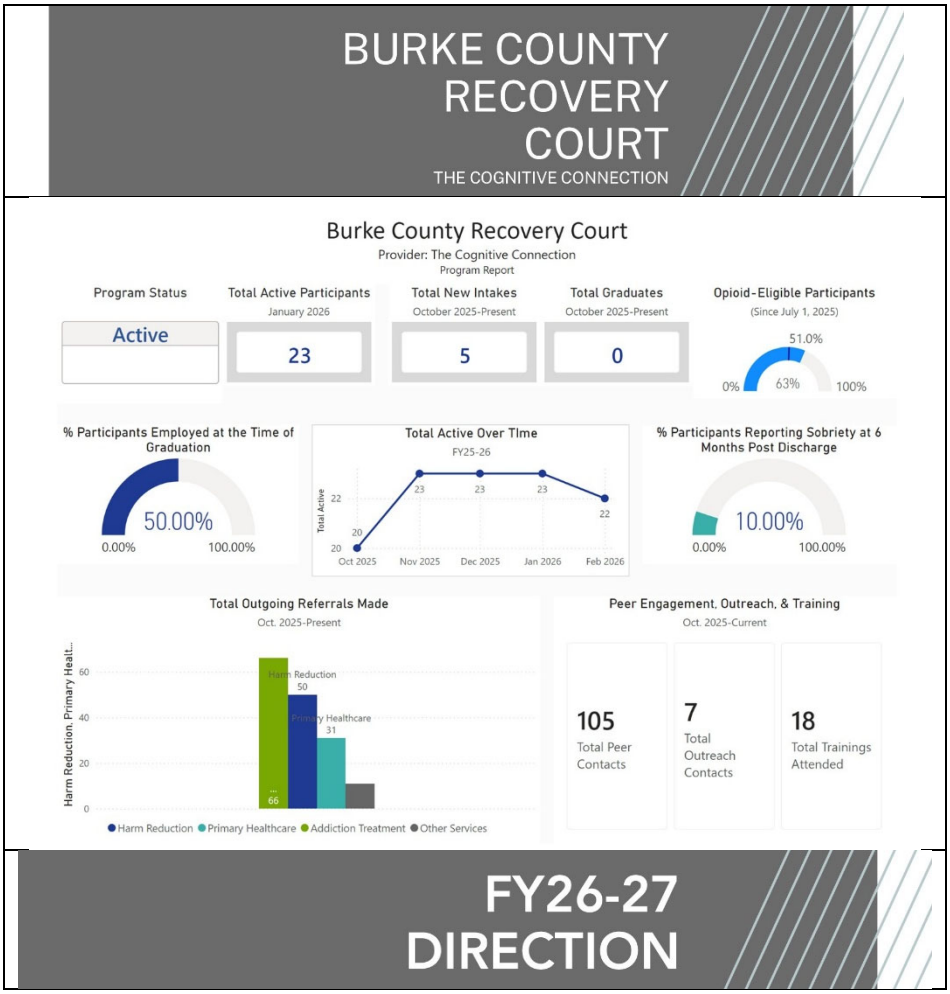
TEAM LEAD (LCAS)
ADMINISTRATIVE (PEER SUPPORT)
PEER SUPPORT (2)
CAD-C (2)

FULLY STAFFED TO BEGIN OFFERING MORNING SAIOP AND SACOT GROUPS.
FULLY STAFFED TO BEGIN OFFERING PEER SUPPORT SERVICES.





Dr. Samuels resumed presenting, the highlights of which were as follows:



Facility Based Crisis (FBC) Center

What It Is

A 16-bed, short-term crisis stabilization and detoxification facility with an average length of stay of 7–14 days. The center will provide medical monitoring, comprehensive assessment, and enhanced care coordination to support transition into long-term treatment and recovery services.

Project Status

- County-owned building, provider managed (selected through RFQ process)
- Planning and partnership development underway
- Site preparation and operational coordination in progress
- Anticipated launch later this year

Community Impact

- Expands local short-term detox capacity
- Provides structured intake and evaluation prior to long-term placement
- Serves as a first evaluation site for IVC cases, reducing emergency department burden
- Improves care coordination and continuity of treatment
- Strengthens system efficiency across EMS, hospitals, and behavioral health providers



Facility-Based Crisis Center: Diversion Model



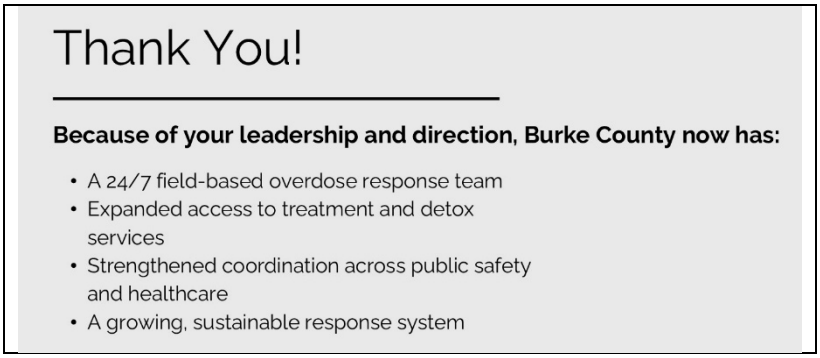
Goal: Redirect appropriate individuals to a structured stabilization setting that improves outcomes while reducing strain on hospitals, law enforcement, and emergency services.

FY26-27 Spending Plan

$6.2M
Available Balance

$2.83M
Total Estimated Budget FY26-27

Category	Amount
Opioid Response Department Operations	$514,137.00
BEAR Team Operations	$737,524.00
Naloxone Distribution	$40,000.00
Burke County Recovery Court	$150,000
Low-Barrier MAT	$242,304
Family Centered Treatment-R	$365,000
SACOT/SAIOP	$240,000
RFP Opportunity for Additional Programs	$550,000
Total	$2,838,965



Chairman Brittain opened the floor for questions or comments. Dr. Samuels responded to several clarifying questions from the Board. She did note that the available funding balance was the total before the FY26 allocation.

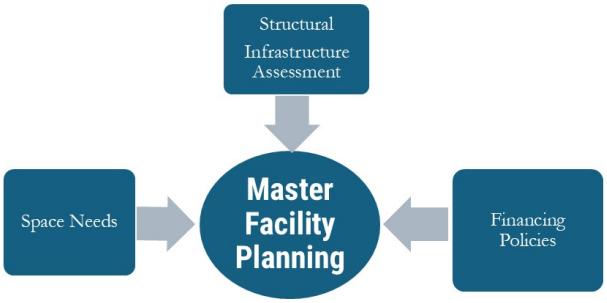
RECESS OF THE MEETING
Chairman Brittain called for a brief recess at 1:52 p.m., and the meeting resumed at 1:57 p.m.

CM - CAPITAL PROJECTS UPDATE AND FORECAST
Brian Epley, County Manager, presented the capital improvement projects update and forecast as follows:



This space is intentionally left blank.

Comprehensive Capital Planning



Improving Lives in Burke County
SERVICE | SUPPORT | ENHANCEMENT

Comprehensive Capital Planning



Improving Lives in Burke County
SERVICE | SUPPORT | ENHANCEMENT

Comprehensive Capital Planning

Impact of Out Year Operational Capital Planning:

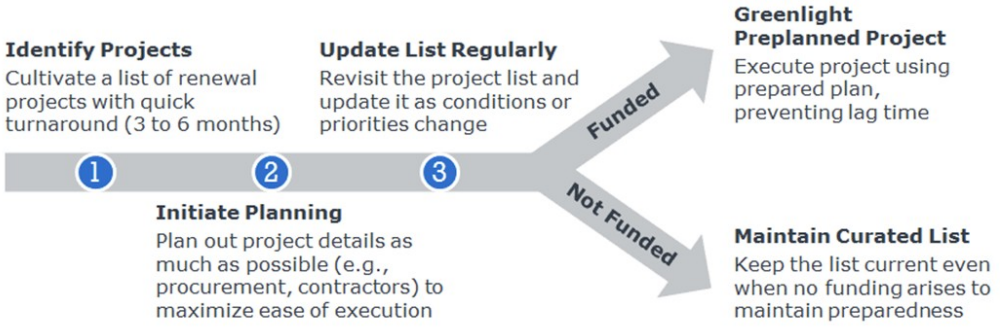
1.) **Manage Increasing Operational Costs:**
- A.) Utility Cost
- B.) Life Cycle Management Plan
- C.) Fleet Management

2.) **Address Aging Infrastructure:**
- A.) Current Infrastructure is Made Up of Survivors
  - Aging
  - Failure Rate Increases as a Function of Age
- B.) Replace versus Repair – R.O.I.

3.) **Formalized Resource Utilization:**
- A.) Forward-Funded Concept

Improving Lives in Burke County
SERVICE | SUPPORT | ENHANCEMENT

Policy Direction – Funded vs. Un-Funded Priorities



Goals and Components of Burke County's CIP Strategy

1. Identify and Prioritize Potential Capital Project Needs
   - A. Short Term……Less Than 12 Months
   - B. Mid-Term…….. 12 – 48 Months
   - C. Long Term…….. More than 48 Months

2. Recommendation of Capital Improvement Plan Financing Policies
   - A. Debt Management Policy
     - I. 10 Year Payout……..50% minimum (currently at 82%)
     - II. Debt Service as a percentage of total expenditures……..…15% maximum (currently at 1.5%)
     - III. Debt to Assessed Value……2.5% maximum (currently at .254%)
   - B. Minimum Un-Assigned Fund Balance Policy……25% minimum

3. Identify and Prioritize Funding Sources

4. Direct Budget Team to Develop & Present Plan for Approval to Commissioners as part of annual budget process

Burke County's Comprehensive Plan 2027-2031



Improving Lives in Burke County
SERVICE | SUPPORT | ENHANCEMENT

- A formal 5-year plan which identifies capital project and equipment needs, provides a planning schedule, and identifies options for funding the plan
  - Funding, Debt Position & Policies
  - Non-Major Operational Capital
  - Major Capital & Building Stock



Capital Needs Funding Sources

Revenue Sources: - Prioritized in this order:

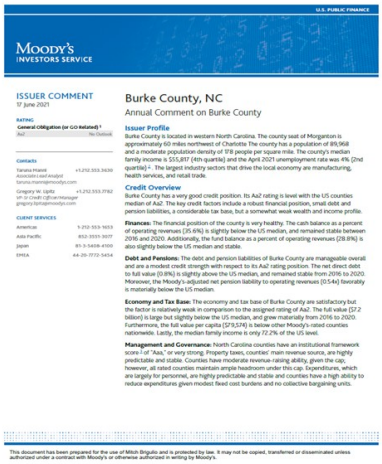
Grant Funds: The County continues to aggressively pursue state and federal grant funding and has been successful in many of these efforts.

Capital Reserve Funds: The proposed funding for Capital Reserve Funds is a dedicated tax rate of 1.1 cents or approximately $1.35 MM annual re-occurring.

Pay-As-You-Go: Whenever possible, pay-as-you-go funding is the preferred method of funding CIP projects. For large capital projects, this is not a feasible option.

Debt Proceeds: Some major capital projects are best funded through bank or bond borrowings that provide for a longer term pay back. These debt service payments would be paid from our debt service fund – which is funded through the dedicated Capital Reserve Fund.

Burke County Credit Worthiness



Moody's INVESTORS SERVICE

ISSUER COMMENT
17 June 2021

Burke County, NC
Annual Comment on Burke County

Issuer Profile

Credit Overview

- Strengths

–Very strong credit position.

–Robust financial position.

–Light debt and pension burden with negligible liability.

–Fund balance and Cash balance as percentages of operating revenues are in-line to slightly above the US median and other Moody's-rated counties.

–Strong financial management.

- Challenges

–Weak socioeconomic profile, relative to the assigned rating of Aa2.

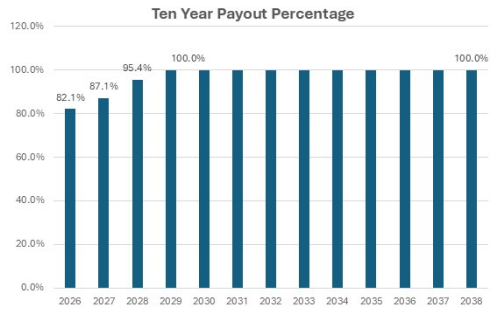
–Should consider formal financing and debt management policies.

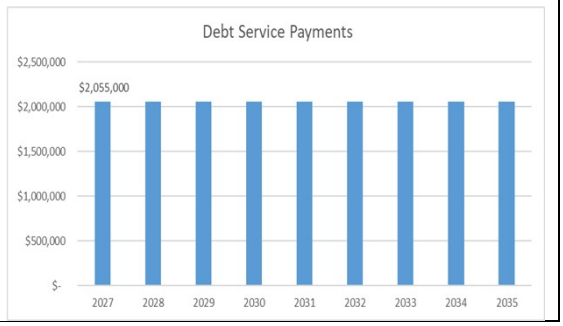
–Median family income is only $55,817 (4th quartile) of the US level.

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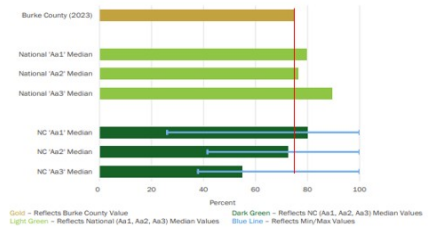
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Debt Item	Amount	Annual Debt Service (P&I)	Payoff Date
County Jail	$ 12,655,000	$ 1,606,750	2037
Total County Debt	$ 12,655,000	$ 1,606,750	
Patton High School	$ 1,420,000.00	$ 1,420,000.00	2026
Draughn High School	$ 1,375,000.00	$ 1,375,000.00	2026
Mountain View Elementary	$ 13,005,000.00	$ 1,646,938.00	2038
Total School Debt	$ 15,800,000.00	$ 4,441,938.00	



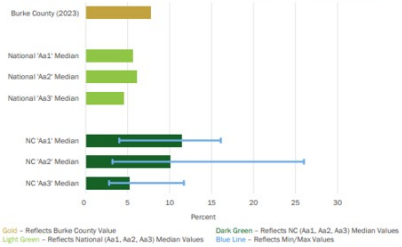


10-year Payout Ratio Peer Comparative



- Rating Considerations:
  - S&P: A payout ratio greater than 65% results in a one point positive qualitative adjustment to the Debt & Contingent Liabilities section of S&P's General Obligation rating methodology.

Debt Service vs. Expenditures Peer Comparative



- Rating Considerations:
  - S&P: The Debt and Contingent Liabilities section defines categories of Net Direct Debt as a % of Total Governmental Funds Expenditures as follows:
    - Very Strong: <8%
    - Strong: 8% to 15%
    - Adequate: 15% - 25%
    - Weak: 25% - 35%
    - Very Weak: > 35%

Non-Major Operational Capital

Board of Commissioners Operational Capital

Major Rolling Stock: Burke County staff annually evaluate the condition and utilization of the rolling stock fleet. As of January 2024, the County's fleet was comprised of 282 vehicles, and the average miles were 97,251. The Burke County budget team has drafted a formal rolling stock replacement policy and a staggered replacement schedule to be included in the CIP plan moving forward. The policy, which will include an annual evaluation of each vehicle's condition and mileage, would be the predictive data analytic – which assumes mechanical and safety standards remain above level 3 on the County's condition rating scale. (1 = bad / 5 =good).

The annual appropriation to the Sheriff's Office, based on prior year experiences and predictive analytics on replace vs. repair indicates a needed total cost for FY 26-27 is to be approximately $1,025,000. Sheriff rolling stock is funded pay-as-you-go inside the Sheriff's department budget. Approximately 57% of the total fleet is operated by either the Sherriff's office or Emergency Services departments. Other rolling stock investments include replacement of several other departmental use vehicles.

Additional rolling stock fleet management will invest $240,000 for fleet replacement in community development, fire marshals' office, social services, and the library.

Ambulance Fleet Management

FY 26-27 will be the fourth budget year of a 5-year capital lease obligation that provides for the replacement of five (5) ambulances – which were delivered in Q2 of 2024. The EMS department has a total fleet of 20 ambulances and utilizes 9 per shift – many of the existing fleets have more than 250,000 miles and are end of life. The total lease amount is $2,113,780 - $422,756 payable over a five (5) year period. Other rolling stock such as Quick Response Vehicles (QRV) will be funded annually on a pay-as-you-go basis – the FY 26-27 budget will include two interfacility wheelchair vans at a total cost of $150,000.

Note: During the presentation, Mr. Epley clarified that this slide should state 18 ambulances.

Ambulance Fleet Management

EMS Operations Overview

Staffing Overview

- Emergency Response Crews…..8 per shift
  - 24/72 Schedule
- Prime Time Crews:……1 per day
  - 12 Hour Peak Hours
- Interfacility Transport Crews: 1

Fleet Overview

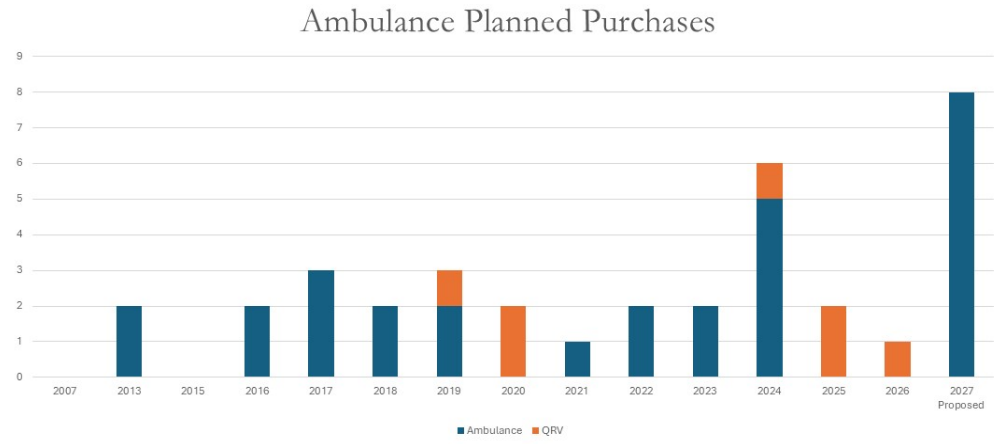
- Emergency Response Trucks……18
  - Old……11
  - New……7
- Transport Trucks: 2
- QRVs: 5

- Average Fleet Milage: 143,000

Ambulance Fleet Management

Type	Total Number	Average Odometer	Average Year	Average Annual Milage	Typical Lifespan (years)	Average Annual Maintenance
QRV	5	118,270	2019	25,000	8	$3,000
Transport	2	76,355	2022	15,000	11	$9,600
911 New	7	64,326	2023	40,000	6	~$5000
911 Old	11	193,132	2019	15,000	2	~Over $10,000

Ambulance Fleet Management



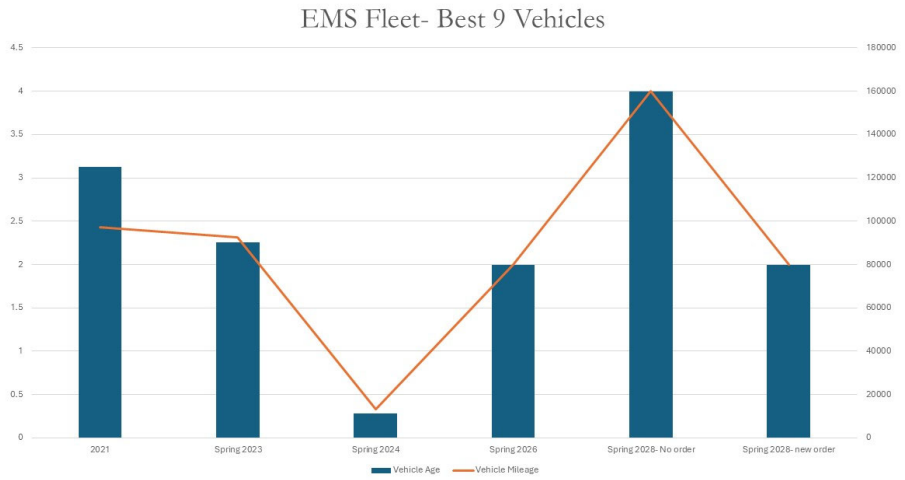
Ambulance Fleet Management

Type	FY 26-27 Cost
Engine Repair	$64,640
Preventative Maintenance	$32,165
Transmission	$21,680
Air Conditioning	$13,784
Brakes	$11,974
Other	$10,548
Body Work	$10,432
Tires	$8,142
General Repairs	$5,106
Batteries	$4,892
Leaking Fluid	$3,073
Headlights / Taillights	$2,271
Cabin filter change	$2,088
Towing	$1,230
Fuel System	$997
Loss of Power	$517
Tire repair	$307
General Maintenance	$256
Total	$194,104
Avoidable	$112,764
Percentage	58%



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Note: During the presentation, Mr. Epley clarified that this table should say FY25-26 Cost.



Ambulance Fleet Management

Replacement Strategy – 8 Units in 2028

- Average Milage: 220,000
- Maintenance Costs: 200% of typical
- All existing Remounts (boxes are 10-15 years old)
- Non-Compliant with NC-OEMS Standards

- New Unit Cost: $320,000
- Ordering Lead Time: 16 Months

2028 Post Purchase Fleet Snapshot

- Total Vehicles: 18
  - New: 8 (2028)
  - Old: 10 (2023)
- Average Vehicle Age: 2.7 Years
- Average Vehicle Milage:111,000

- Proposed consolidated purchase as part of DHHS building renovation ($2.6M)

Operational Capital

Foothills (FHEC) Roofing Project: Included in the five (5) year plan is $1.2M for a complete roof replacement.

Foothills (HVAC) Roofing Project: Included in the five (5) year plan is $600k to complete rooftop and indoor system replacements **(replacing as they fail)**

Computer & PC Replacement: The 2026-2027 CIP plan includes a centralized scale replacement of employees' individual devices. The planned budget amount of approximately $495,000 will be managed through the I.T. department.

Public Safety Radios Plan: This five (5) year replacement strategy allocates approximately $1,347,000 over five (5) budget periods to replace the County's public safety radios.

- FY 23-26……..$1.3M*
- FY 26-27……..$205,000

*Includes Technology Credit of $400,000

Operational Capital

Other EMS Capital:

1. The County's Emergency Medical Services (EMS) Division is initiating a phased capital replacement plan for frontline cardiac monitoring and automated CPR equipment. The current Zoll cardiac monitors are approaching end-of-life status and will no longer be supported for reliable frontline service.
   - Anticipated Cost…….$630,000
   - Timeline……..7/1/2028

2. To ensure compliance with current clinical standards, EMS will transition to (ZENIX) ZOLL Cardiac Monitor and the NXT Auto-Pulse resuscitation systems.
   - Anticipated Cost…….$391,000
   - Timeline……..7/1/2028

I.T. Infrastructure Planning

Network Refresh (EMS bases, Remote SD Offices, Sen Center, Jail	130,000.00
Network Refresh for Avery and Green St Buildings	65,000.00
Network Refresh for Courthouse and Sheriff Dept.	80,000.00
Replace 4 Scale Nodes Per Year (total of 12)	1,200,000.00
Jail network and wifi	50,000.00
Services building network replacement (110 N Green)	80,000.00
BCECC network replacement, radio network, wifi (911 core)	85,000.00
I.T. Strategic Plan	125,000.00
Organizational Wide Public Safety Mobile Radio Replacement 212	1,210,000.00
	3,025,000.00

Out Year Non-Major Capital Planning

GOVERNMENTAL ACTIVITIES OUT-YEAR NON-MAJOR

Project	Total Project Cost	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030	2030-2031	TOTAL
										-
48 - DS300 Election Machines	385,150	-	-	-	192,575	192,575				385,150
					-	-			-	-
EMS - Transition to Zoll - Z Cardiace Monitor	630,000	-	-	155,000	175,000	300,000	-	-	-	630,000
Transition to NXT auto pulse	391,000	-	-	100,000	100,000	191,000	-	-	-	391,000
New EMS Base - Location TBD	625,000	-	-	-	-	-	175,000	-	-	175,000
Courthouse - Roof	300,000	-	-	-	150,000	150,000	-	-	-	300,000
Courthouse - OAC Wiring Project	165,000	-	-	-	-	-	165,000	-	-	165,000
Network Refresh (EMS bases, Remote SD Offices, Sen Center, Jail	130,000	-	-	-	130,000	-	-	-	-	130,000
Network Refresh for Avery and Green St Buildings	65,000	-	-	-	-	65,000		-	-	65,000
Network Refresh for Courthouse and Sheriff Dept.	80,000	-	-	-	-	-	80,000	-	-	80,000
Replace 4 Scale Nodes	300,000	-	-	-	-	-	300,000	-	-	300,000
Jail network and wifi	50,000	-	15,000	20,000	-	-	-	-	-	35,000
Services building network replacement	80,000	-	-	-	-			-	-	-
BCECC network replacement, radio network, wifi (911 core)	150,000	50,000	50,000	50,000	50,000	-	-	-	-	200,000
I.T. Strategic Plan	125,000	62,500	62,500	-	-	-	-	-	-	125,000
Organizational Wide Public Safety Mobile Radio Replacement 212	1,347,000	-	-	205,000	205,000	200,000	200,000	200,000	200,000	1,210,000
									-	
FHEC - Roof Replacement	1,200,000	-	-	300,000	175,000	300,000	300,000	125,000	-	1,200,000
FHEC - HVAC		300,000	300,000							600,000
Burke Services - 110 N Green St	175,000	-	-	-	-	-	90,000	90,000	-	180,000
Detention - Kitchen Equipment / Hotwater Heaters	85,000	-	-	-	45,000	40,000				85,000
20 (12 Main PSAP and 8 at Backup PSAP) Viper Axis Dispatch Console Radios (Portion 911 Eligible budget 152)	-	-	-	-	75,000	150,000	-	-	-	225,000
Soil and Water - Equipment	-	-	-	-	-	-	-	50,000		
Field 3 lights at Reep pack	40,000	-	40,000	-	-	-	-	-	-	40,000
Paving of parking lots at Reep and Simpson	70,000	25,000	25,000	20,000	-	-	-	-	-	70,000
Replace two 20 year Kubota mowers	55,000	27,500	27,500	-	-	-	-	-	-	55,000
	$ 6,693,150	$ 465,000	$ 520,000	$ 1,347,500	$ 1,392,575	$ 1,588,575	$ 1,310,000	$ 465,000	$ 200,000	$ 6,816,150

I.T. Infrastructure Planning

Water/Sewer Fund:

Water Meter / Sewer Meter Installs

AIA Implementation

Indian Hills Lift Station

Solid Waste Fund:

Transfer Station Concrete Floor Re-Surface: Included in the five (5) year plan is $150,000 to resurface the transfer station floor.

Collection Site Offices : Included in the five (5) year plan is $80,000 for Hwy 126 and Hwy 64 collection site offices and bathrooms.

Marsh Trail Collection Site / Scale Relocation / Tub Grinder / New Scalehouse: Included in the five (5) year plan – Applied for NCDEQ $5M Grant – No Local Match

Facilities Master Plan

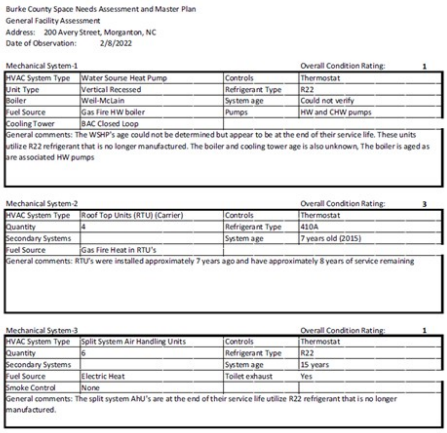
Major Projects & Building Stock

Facilities Master Plan

FACILITIES ASSESSMENT PROCESS & NEEDS:

Building Condition Analysis 1-5 *(where 1 is poor)*

1. Structural
2. Interior Construction
3. Electrical System
4. Mechanical Systems
5. Plumbing Systems
6. Security Systems



Burke County Space Needs Assessment and Master Plan
General Facility Assessment
Address: 200 Avery Street, Morganton, NC
Date of Observation: 2/8/2022

Mechanical System-1 — Overall Condition Rating: 1

HVAC System Type	Water Sourse Heat Pump	Controls	Thermostat
Unit Type	Vertical Recessed	Refrigerant Type	R22
Boiler	Weil-McLain	System age	Could not verify
Fuel Source	Gas Fire HW boiler	Pumps	HW and CHW pumps
Cooling Tower	BAC Closed Loop		

General comments: The WSHP's age could not be determined but appear to be at the end of their service life. These units utilize R22 refrigerant that is no longer manufactured. The boiler and cooling tower age is also unknown, The boiler is aged as are associated HW pumps

Mechanical System-2 — Overall Condition Rating: 3

HVAC System Type	Roof Top Units (RTU) (Carrier)	Controls	Thermostat
Quantity	4	Refrigerant Type	410A
Secondary Systems		System age	7 years old (2015)
Fuel Source	Gas Fire Heat in RTU's		

General comments: RTU's were installed approximately 7 years ago and have approximately 8 years of service remaining

Mechanical System-3 — Overall Condition Rating: 1

HVAC System Type	Split System Air Handling Units	Controls	Thermostat
Quantity	6	Refrigerant Type	R22
Secondary Systems		System age	15 years
Fuel Source	Electric Heat	Toilet exhaust	Yes
Smoke Control	None		

General comments: The split system AHU's are at the end of their service life utilize R22 refrigerant that is no longer manufactured.

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Facilities Master Plan

Facilities Evaluated During Space Needs Assessment

Building	Location	City	Rating	Sq. Ft	Yr. Built
Animal Shelter	425 Kirksey Drive	Morganton	1.00	4,000	1980
EMS Station #1: Hospital	2201 S Sterling Street	Morganton	1.00	5,000	1975
Landfill - Transfer Station	2500 Marsh Trail	Morganton	1.40	12,500	1997
Avery Building	200 Avery Avenue	Morganton	2.13	28,700	1923
Sheriff's Office (Sheriff side only)	150 Government Drive	Morganton	2.14	11,500	1993
Burke-Catawba District Confinement Facility (Old Jail)	148 Government Drive	Morganton	2.14	48,500	1993
Human Resources Center (HRC)	700 East Parker Road	Morganton	2.42	56,500	1979
EMS Station #2: Rutherford College *(Hospital Owns Property)*	90 Campus Street	Rutherford College	2.50	1,900	1975
Hildebran Building (Water & Sewer Office)	101 Main Ave West	Hildebran	2.58	7,100	1964/2016
Courthouse	201 South Green Street	Morganton	2.60	55,000	1974
EMS Station #4: Hildebran	705 US Highway 70W	Hildebran	2.83	2,200	2002
Landfill - Office/Garage	2500 Marsh Trail	Morganton	3.00	5,000	1988
Morganton Library	204 South King Street	Morganton	3.00	16,800	1995/2004
Morganton Senior Center	501 North Green Street	Morganton	3.00	17,600	1984
Burke Agricultural Building	130 Ammons Drive	Morganton	3.50	14,000	2002
Burke Services Building	110 North Green Street	Morganton	3.83	24,000	1954/2000
Valdese Library *(Share Ownership with Valdese)*	213 St. Germain Avenue	Valdese	3.83	9,000	1943/2004
Foothills Higher Education	2128 South Sterling Street	Morganton	4.00	130,000	1980/2004

***Building Condition Rating Scale 1 thru 5 where 1 is poor condition and 5 is new or excellent condition**

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Facilities Master Plan

Short Term: ✓
- Jonas Ridge Phase I & II
- East Burke Collection Site
- Courthouse Improvements
- 201 Avery - APS
- Storage Management Policies

Mid Term:
- Animal Services Building ✓
- Emergency Medical Services Base #1 ✓
- Health and Human Services Building
- Regional Substance Abuse Rehabilitation Center
- Indian Hills Pump Station

Long Term:
- Library Expansion
- Solid Waste MSW Development
- Water/Sewer Infrastructure
- EMS Base Additions

Facilities Master Plan – DHHS Project

HRC: The Burke County Human Resource Center (HRC) originally built in 1973, has reached its end of life. Over time there have been many interior renovations, roof investments, and investments in mechanical systems. The overall building score from the 2020 analysis was 2.42. This approximately 62,000 square foot building houses approximately 250 full-time employees and is a critical function of service delivery.

The last twelve (12) months have included a comprehensive space planning program that includes projections of demographics, staff surveys, & legislative changes. The space planning will be followed by site location civil/survey analysis.

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Facilities Master Plan – DHHS Project

Cost Component	Low Estimate	Average Estimate	High Estimate
Construction (Base + Alternates + Contingency)	$13,651,680	$14,359,380	$15,067,080
Professional Services (A/E – 7.3%)	$996,573	$1,048,235	$1,099,897
Total Project Cost	**$14,648,253**	**$15,407,615**	**$16,166,977**

Potential Alternate Deductions (Average): $1,751,566

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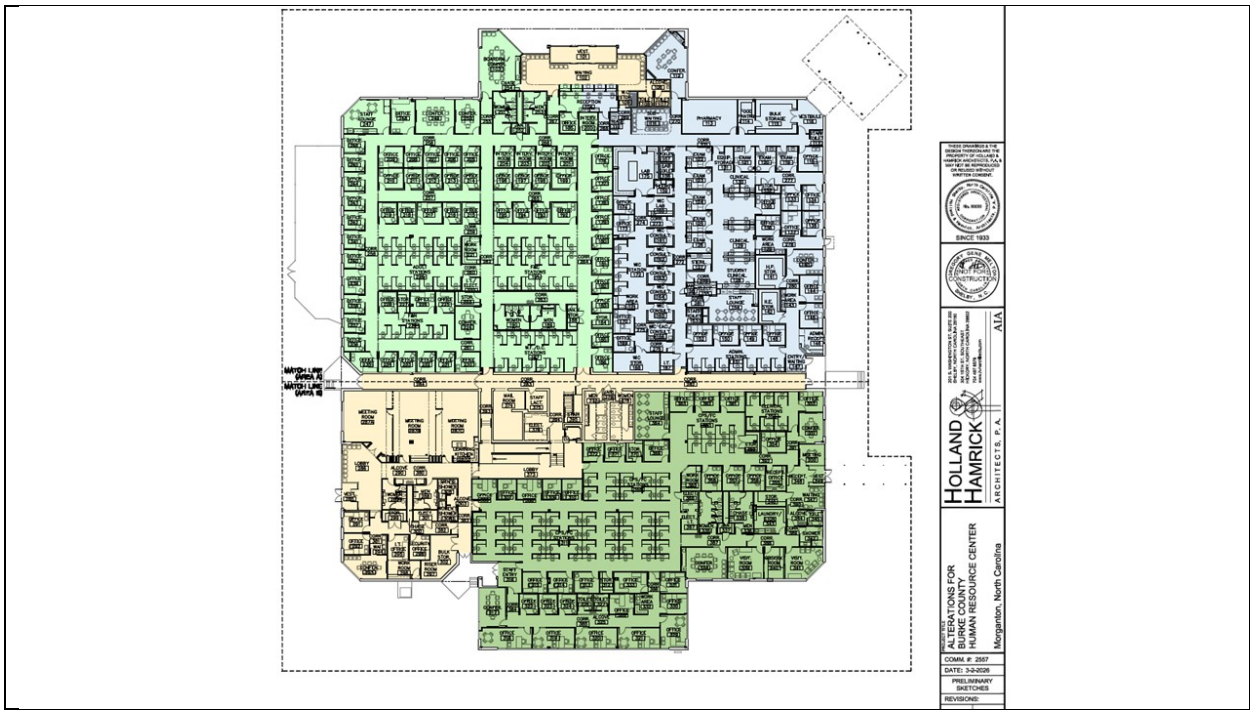
Renovations to Burke County Human Resources Center
Project Schedule
February 16, 2026

Design Phase	Date
Schematic Design	February-26
Design Development	June-26
Construction Documents	September-26
Plan Review & Permitting	October-26
Bidding & Procurement	
Receipt of bids	October-26
Construction	
Project Award & Notice to Proceed	November-26
Phase 1 Substantial Completion	May-27
Phase 2 Substantial Completion.	November-27
Phase 3 Substantial Completion.	May-28
Final Inspections & Project Closeout	June-28

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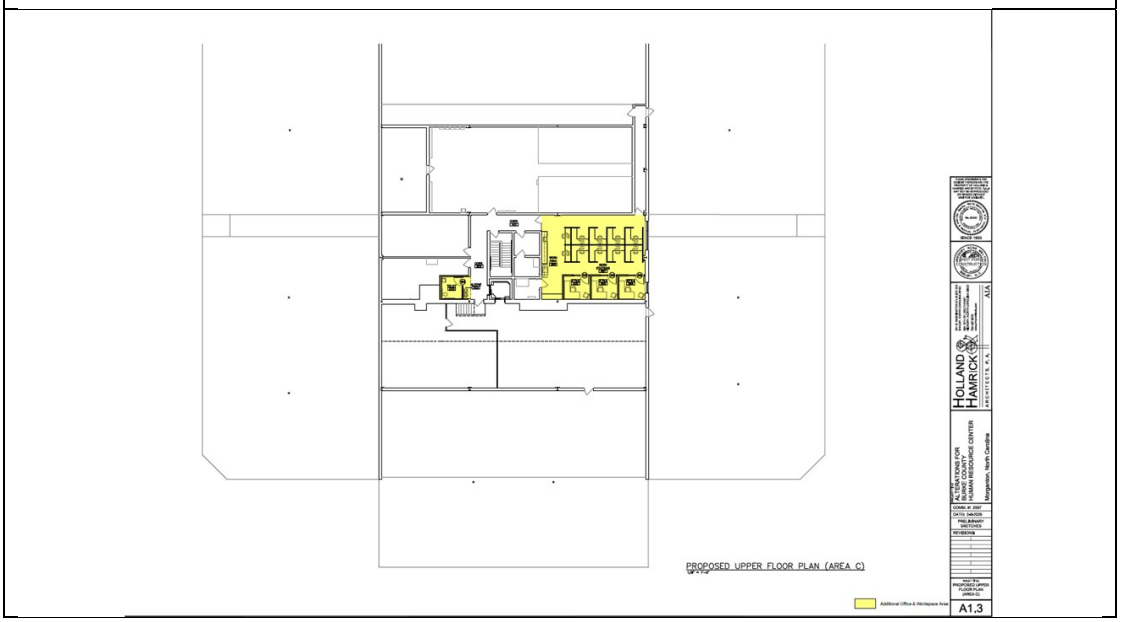
Gregory “Greg” Melton, Architect, Holland and Hamrick, presented an update on the Human Resource Center renovations as follows:



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PROPOSED FLOOR PLAN (AREA B)
A1.2


PROPOSED UPPER FLOOR PLAN (AREA C)
A1.3

Chairman Brittain opened the floor for questions or comments. Mr. Epley responded to a clarifying question regarding financing for the Human Resource Center (HRC) renovations and the planned replacement of the ambulance fleet. Chairman Brittain expressed concern that delaying ambulance replacements could result in a large number needing to be replaced at the same time, creating significant costs. Mr. Epley explained that while a staggered replacement schedule of two (2) to three (3) units at a time is preferable, the fleet must first be brought back into reliable operating condition before that cycle can be established. This approach would also allow the County to purchase more standardized and less costly units than those acquired in 2023. James Robinson, Emergency Services Director, noted that manufacturer backlogs and long wait times for ambulance production also affect replacement timelines. The discussion also touched on options such as rotating higher-mileage vehicles and utilizing smaller transit-style vehicles.

The Board also discussed the proposed HRC renovation and asked whether the project would provide sufficient space for all remote staff to return to the office, but it would not. This prompted a broader discussion of costs, design options, and the Board's direction during last year's budget discussions to renovate the existing facility without increasing the building's square footage due to expense. Mr. Epley reviewed the cost estimates for the three (3) renovation options and explained that earlier figures were based on internal assessments before an engineer was engaged, and that some areas of the building were found to require more work than initially anticipated. Commissioners asked whether the current design would allow for future expansion, which Mr. Melton confirmed could occur toward the front portion of the property, where grading had previously been completed.

The conversation also addressed staffing requirements associated with state regulatory changes and whether the facility would support future compliance needs, highlighting ongoing challenges related to staffing levels and available space. Staff emphasized that the proposed design represents the most efficient use of the existing building footprint without constructing a new facility or relocating services. Mr. Melton noted that the layout closely resembles what would likely be designed for a new building and described the project as a strong balance between resources and outcomes. Department leaders, including Korey Fisher-Wellman, DSS Director, and Local Health Director, Danny Scalise, expressed confidence that the design maximizes available space, though the Health Department would lose some space to DSS under the new plan. Dr. Scalise also raised concerns about maintaining clinic operations during construction, noting the potential cost of relocating services offsite. Mr. Melton explained that the renovation is being designed with future additions in mind, so the facility would not require complete redesign if expansion were needed later. Mr. Epley acknowledged the logistical challenges of renovating an operational facility but noted that phased construction and flexibility can mitigate disruption, emphasizing that renovating the existing space is approximately 80 percent less expensive than constructing a new facility and would allow the building to continue serving the community for years to come.

CM - PUBLIC EDUCATION FUNDING & PERFORMANCE

Brian Epley, County Manager, presented the public education funding and performance update as follows:

Public Education Policy & Funding 2026-2027

FY 25-26 Commissioners' Strategic Plan

FOCUS AREA 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.

FOCUS AREA 2: ECONOMIC GROWTH & SUSTAINMENT
Promotion of Burke County as a business and economic center in the region through recruitment of new industry, creating a healthy business climate for existing businesses.

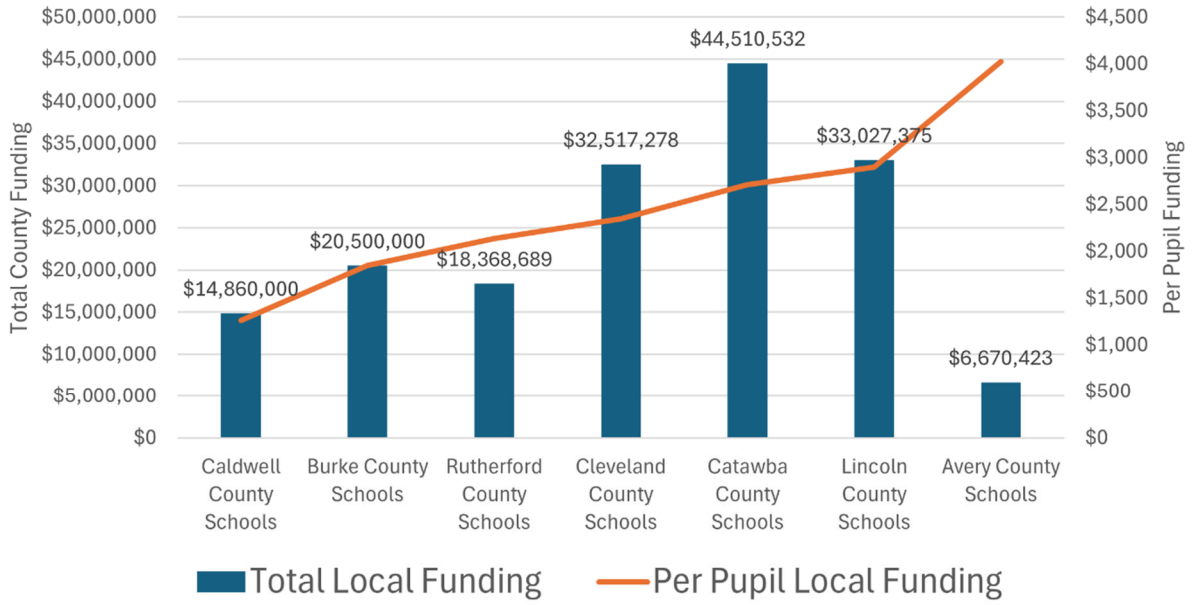
FOCUS AREA 3: PUBLIC SAFETY& WELL BEING
To ensure the safety of our residents through efficient and effective public safety agencies.

FOCUS AREA 4: FISCAL STEWARDSHIP
Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

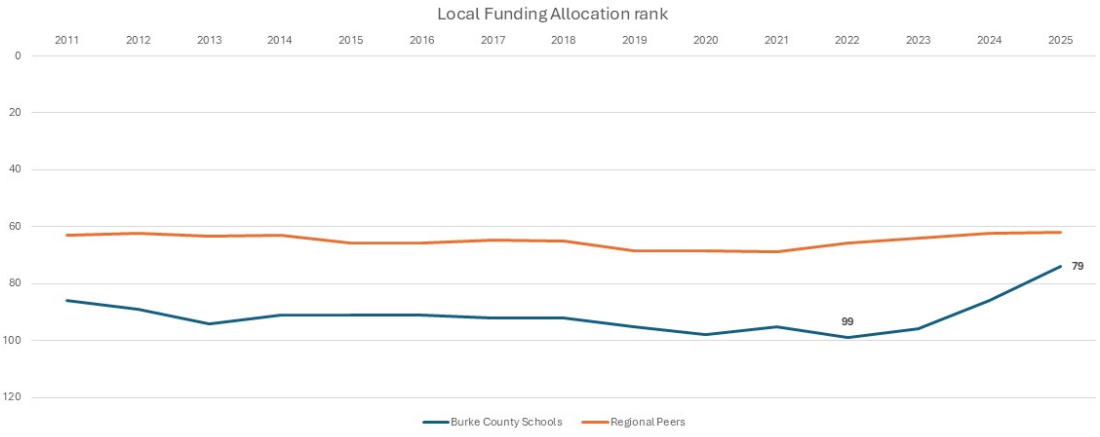
FOCUS AREA 5: EMPLOYER OF CHOICE
To promote a professional value-based employee centric workplace that promotes innovation, performance, and integrity, and differentiation.

BURKECOUNTY

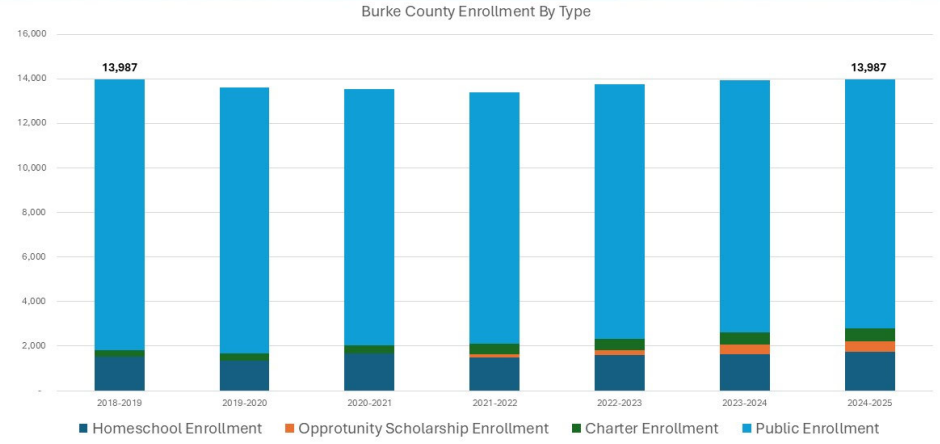
Regional School Funding Comparison



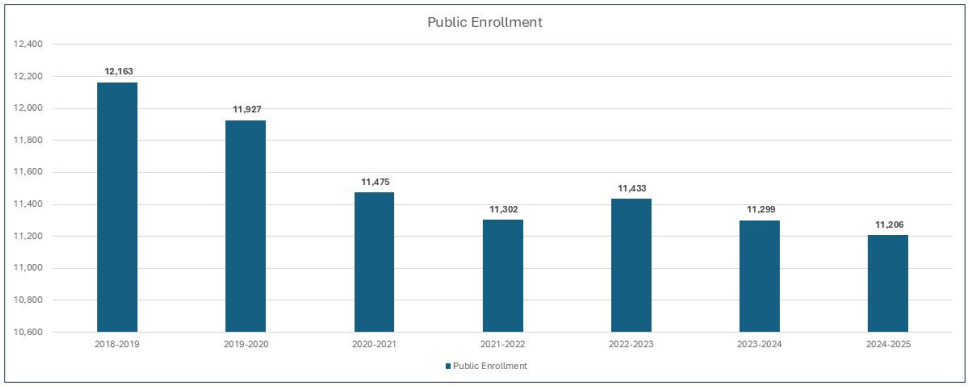
Local Funding Progress



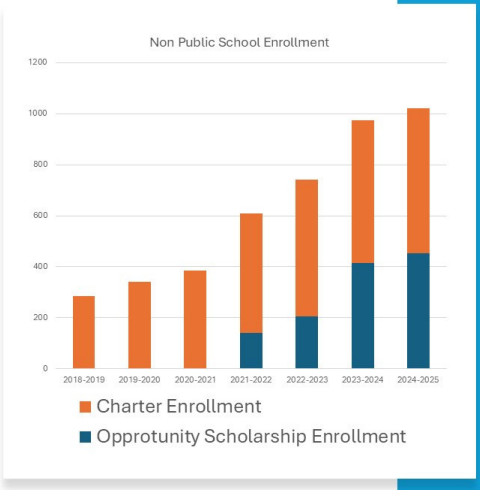
All Educational Enrollment



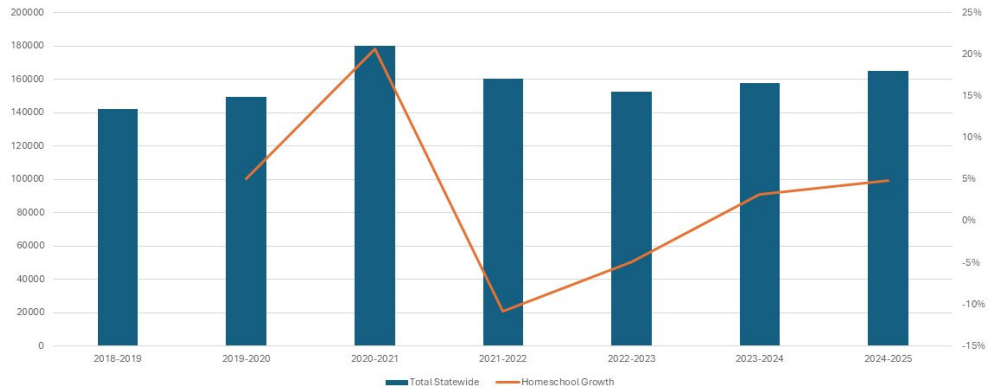
Public School Enrollment



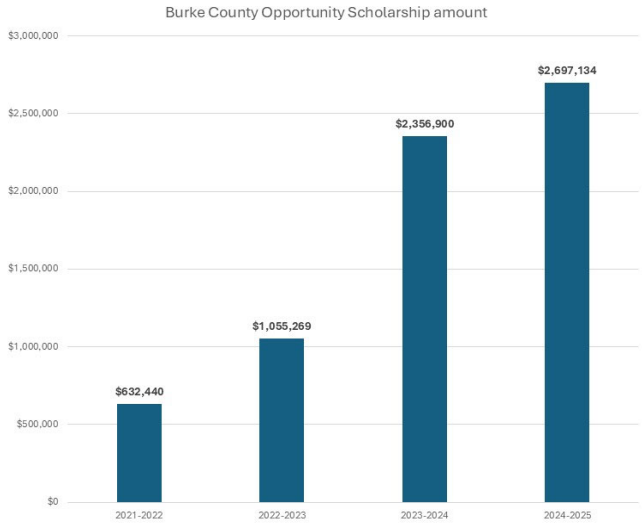
Non-Public Enrollment



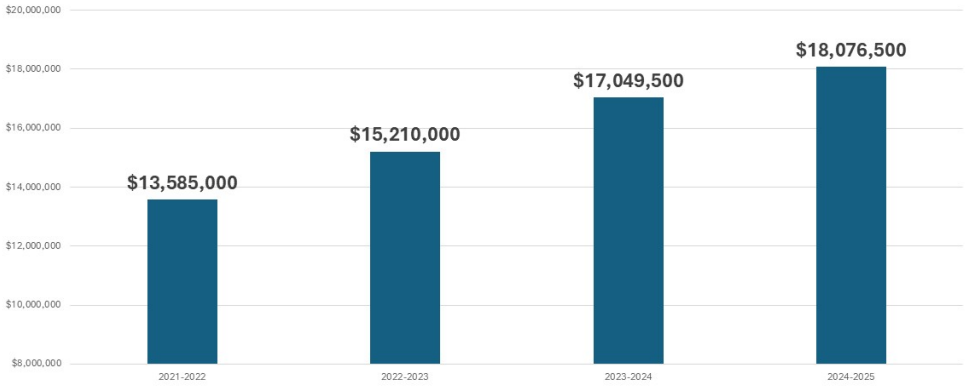
Statewide Homeschool Trends



Opportunity Scholarship Impact



Total Revenue Diversion

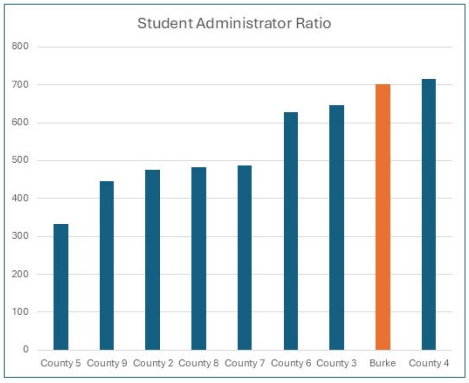


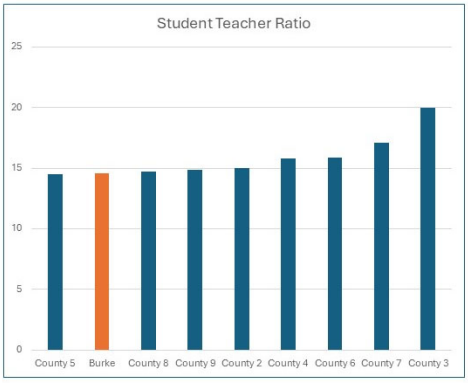
Alternative Schooling Funding Impact

	2018	2025	Change	Budget Impact	5 year impact	Teacher Funding Equivalent
Burke Public Schools ADM	12,163	11,206	(957)	($12,441,000)	($62,205,000)	(888)

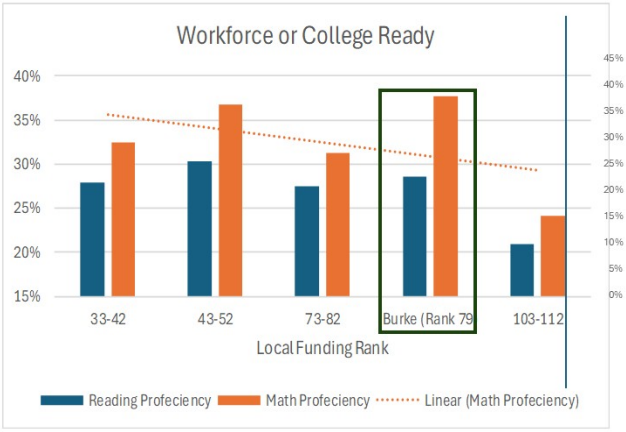
Non-Traditional School Change 2018-2025	
Private School Growth	453
Homeschool growth	220
Charter Growth	284
Total	957

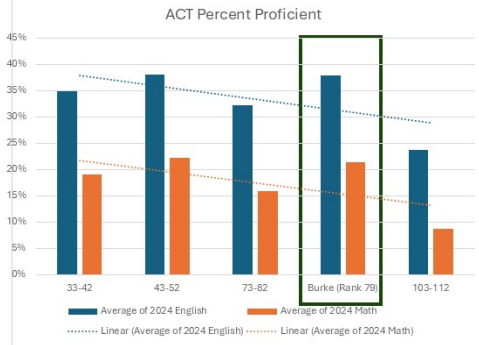
Funding Teachers First





Focus on Results





FY 26-27 Deficit Summary

Here is the language sent to DPI on Monday (June 30) by the U.S. Department of Education on the federal funding that is being withheld: "Given the change in Administrations, the Department is reviewing the FY 2025 funding for the [Title I-C, II-A, III-A, IV-A, IV-B] grant program(s), and decisions have not yet been made concerning submissions and awards for this upcoming academic year. Accordingly, the Department will not be issuing Grant Award Notifications obligating funds for these programs on July 1 prior to completing that review. The Department remains committed to ensuring taxpayer resources are spent in accordance

Deficit Summary	
Average Daily Membership Decline	$1,612,090
State Revenue Decline of 2.5%	$2,755,656
SNP Indirect Cost	$201,000
Title 2 Funding	$409,306
Title 3 Funding	$162,786
Title 4 Funding	$415,520
Total Funding Loss	**$5,556,358**
Expected Cost Increases	
2% COLA	$130,640
5% Health Insurance	$142,219
Inflation 2.7%	$213,278
Total Cost Increases	**$486,137**

Federal Funding Overview: Titles II, III & IV (NC Schools)

- **Title II – Supporting Effective Instruction**
- **Purpose:** Strengthen teachers and school leaders
  Used For:
  - Professional development
  - Instructional coaching
  - Class size reduction
  - Principal leadership support

Federal Funding Overview: Titles II, III & IV (NC Schools)

- **Title III – English Learner Support**
- **Purpose:** Support students learning English
  Used For:
  - ESL teachers & tutoring
  - Language development materials
  - Translation & family engagement services

Federal Funding Overview: Titles II, III & IV (NC Schools)

- **Title IV – Student Support & Enrichment**
- **Purpose:** Support the "whole child"
  Used For:
  - Arts, STEM, civics programs
  - School safety & mental health
  - Educational technology

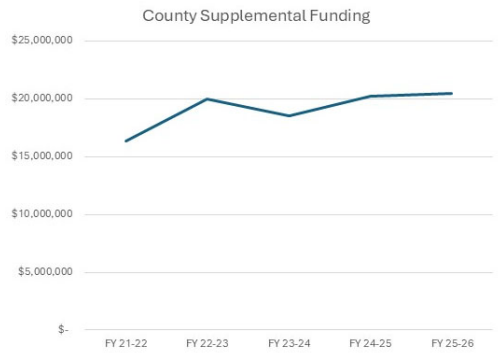
Funding Shortfall Consideration

Item	Amount
Projected Budget Shortfall	$4,600,000
Strategic Administrative reduction	$3,100,000
School Fund Balance Appropriation*	$750,000
County Funding Request	$750,000

*Current School Fund Balance is $2,500,000
*FY-26-27 could reinstate low wealth funding

Consideration Strategies

- School Health Nursing.....TBD
- Increased Operational allotment.....TBD



Commissioner Direction and Questions

Chairman Brittain opened the floor for questions or comments. Mr. Epley announced the potential reinstatement of low-wealth school funding, which may occur this year. These funds were not included in the current projections and, if restored, could reduce the school system's reliance on fund balance. The Board briefly discussed the possibility of partnering with Burke County Public Schools to assist with funding for school nurses. Additional discussion on these matters is expected during the FY 2026–2027 recommended budget process.

AM250 - UPDATE ON SEMIQUINCENTENNIAL ACTIVITIES

Ed Phillips, Chair of the America 250 Committee, provided an update on planned activities for the Semiquincentennial celebration as follows:



FLAGSHIP EVENTS

- **Time Capsule**
- Designed and manufactured by WPCC
- Location: Burke County Register of Deeds lobby
- Contents: To be determined by Committee
- Cost: $2,000+
- Funding: Grant Applied for. Verbally approved. No check yet!

4TH OF JULY, 2026

- **Fireworks**
  - -Morganton and Valdese
- **Parade**
  - - Glen Alpine

Many discussions regarding a parade in downtown Morganton.

Volunteers to work on a 4th of July event have been limited.

February 26th meeting with City/County Reps determined that resurrecting a parade in downtown Morganton was not feasible.

It was determined that the best option was to promote the well-established Glen Alpine 4th of July Parade!

PARTNERSHIPS & SPONSORSHIPS

- **Partners:**
  - WPCC
  - Historic Burke Foundation
  - D.A.R.
  - S.A.R.
  - Burke County Public Schools (BCPS)
  - *The Paper*

4TH GRADE OUTREACH

- North Carolina History taught in 4th Grade
- 20+ Year History of Revolutionary War Week educational programming
- Managed by the Historic Burke Foundation
- Due to ageing volunteer corps, no event was scheduled in 2025
- Spring, 2026 event postponed to Fall, 2026
- Discussions with BCPS about future of this program
- Possibly creating a video for in-class use along with historical reenactors at each school. Eliminates field trip and weather-related issues for volunteers.

MARKETING & OUTREACH

- Social media campaigns
- Billboards
- Partner email cross-promotion

BUDGET SNAPSHOT

- County Admin Support: Minimal staff time
- Burke County TDA CEO Ed Phillips has been managing America 250 projects on behalf of the Burke County Board of Commissioners.
- Grant Administration is currently being managed through the TDA
- $40,000 in State Grants have been received and mostly expended
- $8,000 balance for 4th Grade Educational Outreach, Time Capsule, Liberty Tree and 4th of July, 2026 event. These funds must be spent before September 30, 2026.

2026-2030

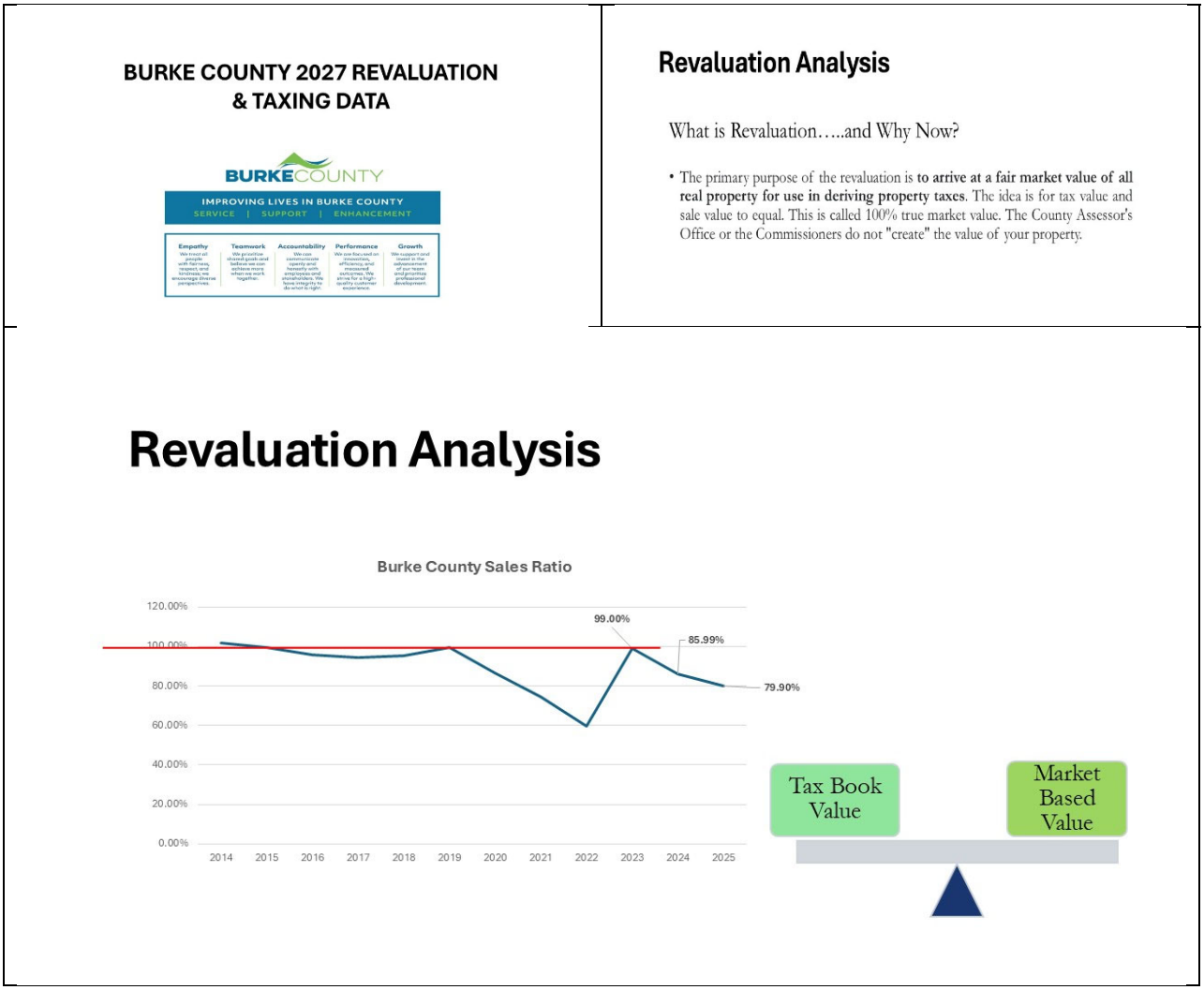
- 2027= Burke County's 250th Anniversary! 1777
- 2030= 250th Anniversary of the Battle of King's Mountain
- Overmountain Men gathered in Quaker Meadows, October, 1780
- 1,500 men mostly on horseback at Quaker Meadows



Chairman Brittain opened the floor for questions or comments; there were none.

CM - BUDGET FORECAST

Brian Epley, County Manager, presented the budget forecast as follows:



Revaluation Analysis... § 105-286 : Timing

- (1) Every county in North Carolina must reappraise all real property at least once every eight years.
- (2) Optional Advancement – a county may, at the discretion of the Board of County Commissioners, conduct an earlier reappraisal.

- NC DOR - Recommends that counties adopt, if possible, a four-year schedule.
- Burke County has opted to use the four-year schedule.
  - The last county-wide reappraisal was 2023
  - The next scheduled reappraisal is 2027

Revaluation Analysis... § 105-286 : Methodology

- Market Value is:

1. The price estimated in terms of money
2. At which the property would change hands
3. Between a willing buyer - And a willing seller.

Revaluation Analysis

- What is Revaluation…..and Why Now?

Levy Type	Valuation	% of Values	Valuation Schedule
Real	$ 8,760,340,598	75%	Revaluation
Personal	$ 1,004,998,517	10%	Annually
Motor Vehicles	$ 998,190,352	11%	Annually
State Boards	$ 302,619,649	4%	Annually

N.C.G.S. 105-286
- Conducted at least every eight (8) years
- Or – when sales ratio (< .85%) or (>1.15%)

Burke County SALES

*1/2/2023 -Present
Qualified Sales Only

COUNTY WIDE

TOTAL SALES
• 4,722

TYPE
• 229 COMM/IND
• 4493 RES

RESIDENTIAL SALES / IMPROVED

PSF
$153 MEDIAN
$ 161 AVERAGE

MEDIAN YEAR BUILT IS 1978

MEDIAN SF
1,453

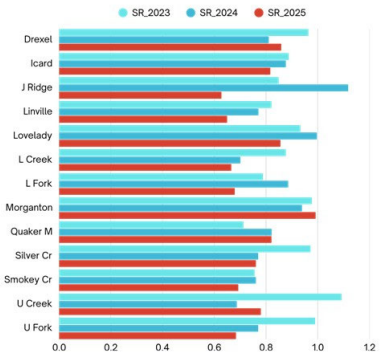
VACANT SALES

PRICE PER ACRE
$21,978
MEDIAN
$45,102
AVERAGE

Township	SR 2023	SR 2024	SR 2025
Drexel	0.964	0.811	0.859
Icard	0.888	0.877	0.817
Jonas Ridge	0.849	1.118	0.628
Linville	0.821	0.771	0.650
Lovelady	0.933	0.997	0.856
Lower Creek	0.877	0.701	0.666
Lower Fork	0.788	0.886	0.679

Township	SR 2023	SR 2024	SR 2025
Morganton	0.977	0.939	0.992
Quaker Meadows	0.713	0.822	0.821
Silvercreek	0.972	0.770	0.761
Smokey Creek	0.756	0.761	0.693
Upper Creek	1.092	0.687	0.780
Upper Fork	0.990	0.770	0.684

Trending by Township – Individual Market Performance – Based on Sales Ratio



Drexel	**1.1234**	**0.9448**
Icard	1.0868	1.0739
J Ridge	1.3529	1.7797
Linville	1.2638	1.1864
Lovelady	1.0904	1.1642
L Creek	1.3160	1.0519
L Fork	1.1596	1.3051
Morganton	0.9851	0.9463
Quaker M	0.8687	1.0020
Silver Cr	1.2770	1.0116
Smokey Cr	1.0917	1.0988
U Creek	1.4003	0.8817
U Fork	1.4461	1.1243

Concept Development

Methodology

Clustering

We condensed 778 MAs into 293 clusters

Rationale

- MAs remain the valuation unit
- Clusters are an analytical tool only
- Purpose is clarity and manageability

Trended Sales Ratio by Cluster

Rationale

- All vacant land sales are trended
- Trending applied before evaluating performance
- Ensures sales from different years are comparable

Each cluster assigned a trended sales ratio

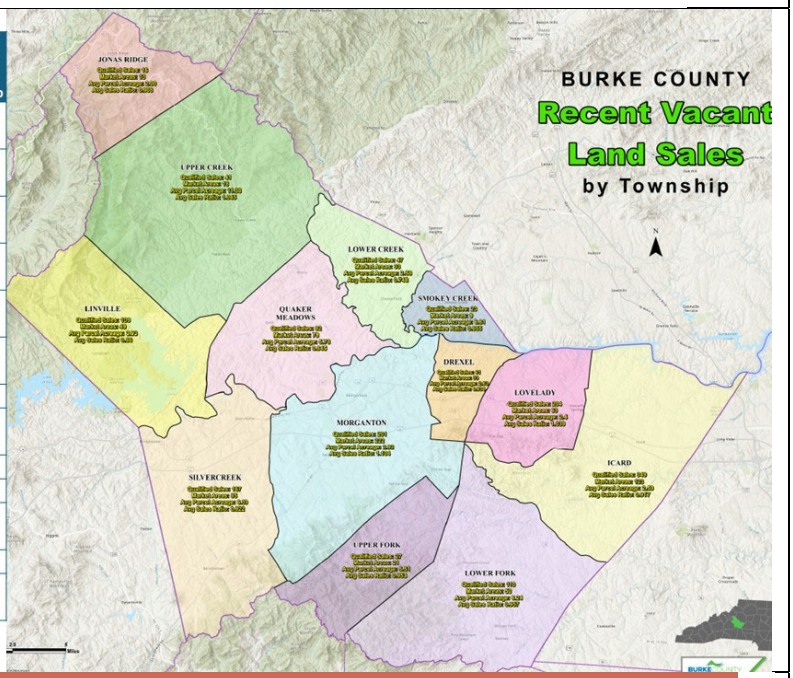
7

Reflections & Growth

Burke County Vacant Land Overview

- 1,447 vacant land sales analyzed
  - 294 residential clusters have land pricing
  - 203 clusters have a sale/sales
  - ~56% below market
  - ~31% at / near market
  - ~13% above market

Township Name	Qualified Sales	Market Areas	Average Parcel Acerage	Average Sales Ratio
Upper Creek	41	18	11.38	1.045
Smokey Creek	23	9	6.81	0.855
Silvercreek	167	85	6.39	0.922
Lower Fork	110	50	6.24	0.957
Quaker Meadows	92	79	5.79	0.845
Upper Fork	27	21	5.51	0.953
Linville	109	49	3.93	0.860
Morganton	201	222	2.92	1.104
Drexel	61	33	2.63	0.934
Icard	349	123	2.59	0.917
Lower Creek	47	33	2.58	0.748
Lovelady	204	63	2.40	1.039
Jonas Ridge	16	13	2.00	0.908

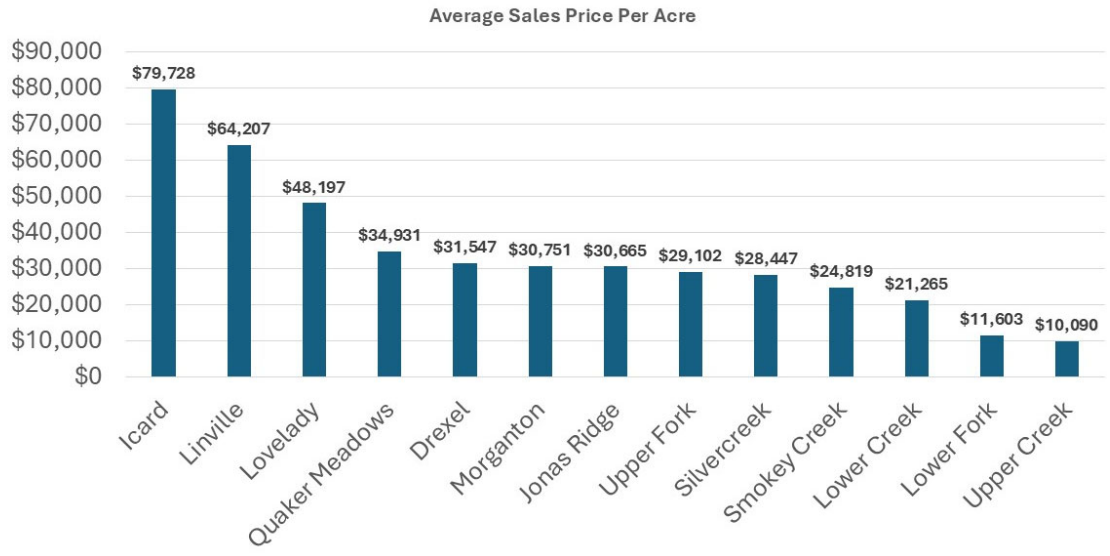


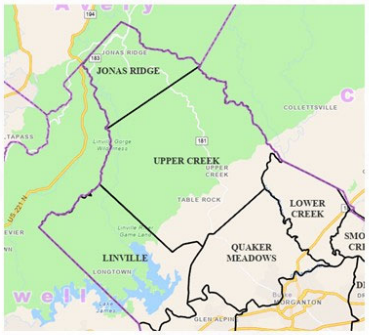
SALES BY TOWNSHIP

.72	Lower Creek	129
.76	Smokey Creek	41
.77	Lower Fork	245
.77	Upper Fork	77
.77	Silvercreek	509

.77	Linville	235
.78	Jonas Ridge	59
.78	Upper Creek	80
.80	Quaker Meadows	339
.81	Icard	921

.82	Morganton	1033
.82	Drexel	289
.83	Lovelady	536





JONAS RIDGE

Sales **40 imp/ 19 vac**

Vacant SR_trended: 0.775

Improved SR_trended: 0.692

UPPER CREEK

Sales **34 imp / 46 vac**

Vacant SR_trended: 0.771

Improved SR_trended: 0.758

LINVILLE

Sales **115 IMP / 120 vac**

Vacant SR_trended: 0.731

Improved SR_trended: 0.731

QUAKER MEADOWS

Sales 227 **imp / 112 vac**

Vacant SR_trended: 0.759

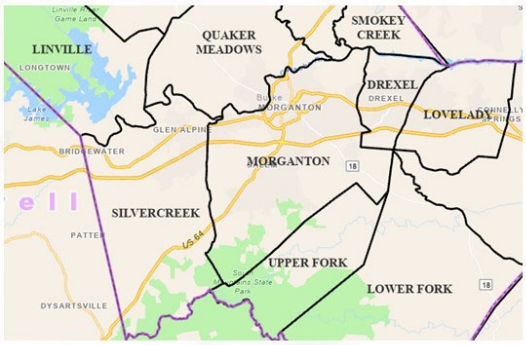
Improved SR_trended: 0.755

LOWER CREEK

Sales **69 imp / 60 vac**

Vacant SR_trended: 0.670

Improved SR_trended: 0.666



Silvercreek

SALES 308 IMP / 201 VACANT

VACANT SR_TRENDED: 0.784

IMPROVED SR_TRENDED: 0.731

Morganton

SALES 812 IMP / 221 VACANT

VACANT SR_TRENDED: 0.964

IMPROVED SR_TRENDED: 0.782

Drexel

SALES 215 IMP / 74 VACANT

VACANT SR_TRENDED: 0.863

IMPROVED SR_TRENDED: 0.780

Smokey Creek

SALES 15 IMP / 26 VACANT

VACANT SR_TRENDED: 0.740

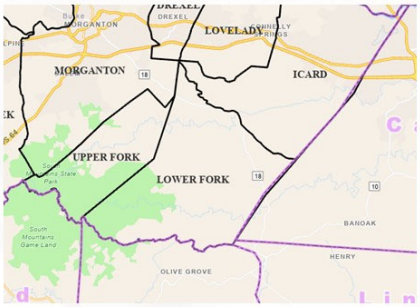
IMPROVED SR_TRENDED: 0.747

Lovelady

SALES 316 IMP / 220 VACANT

VACANT SR_TRENDED: 0.893

IMPROVED SR_TRENDED: 0.738

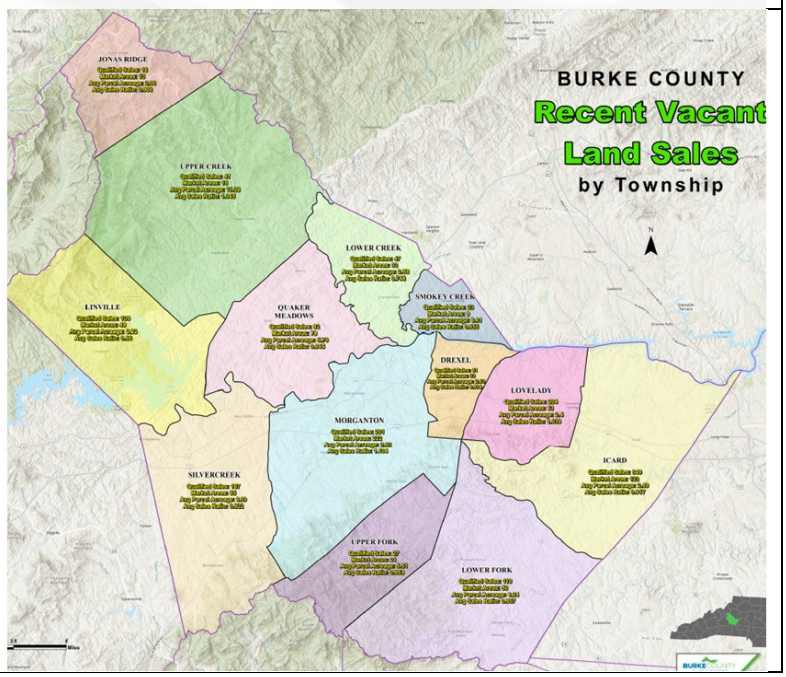


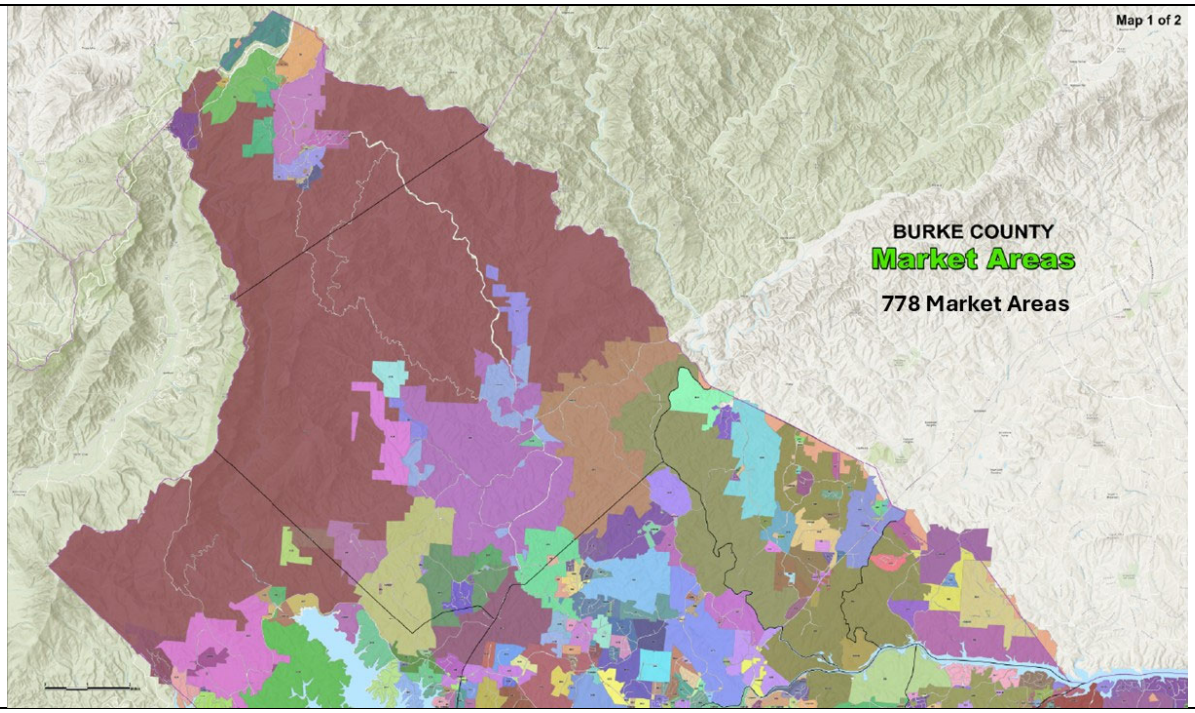
Upper Fork	Lower Fork	Icard
SALES 45 IMP / 32 VACANT	SALES 121 IMP / 124 VACANT	SALES 532 IMP / 389 VACANT
VACANT SR_TRENDED: 0.922	VACANT SR_TRENDED: 0.758	VACANT SR_TRENDED: 0.782
IMPROVED SR_TRENDED: 0.800	IMPROVED SR_TRENDED: 0.713	IMPROVED SR_TRENDED: 0.717

BURKE COUNTY	1
TOWNSHIPS	13
MARKET AREAS	1000
PARCELS	60 K

- CAMA (Computer-Assisted Mass Appraisal) applies the same schedules and formulas to all parcels. Our software is by a vendor called Farragut.

TOWNSHIPS





Completed Task Force Meeting Topics

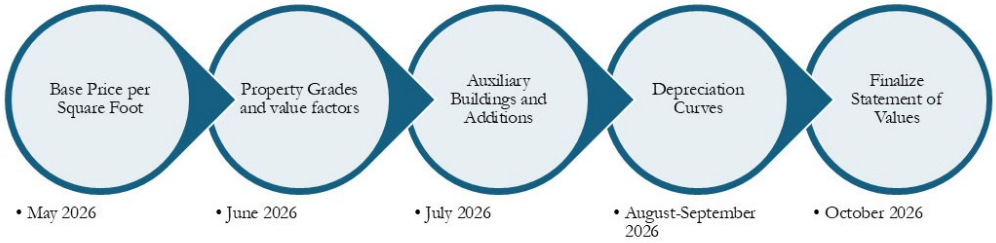
Task Force Kickoff	Sales Ratio Review	Unimproved Land Value	Exemptions and Present Use Value	Commercial Property
• November	• December	• January	• February	• March

Burke County Reval Committee Process

REAPPRAISAL TIMELINE

Projected	2025											2026											2027						
	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Ju
Validate sales																															
Remeasure validated sales																															
NBHD delineation																															
Review Land Factors, Types & Codes																															
Pictometry																															
Commercial Property Review																															
Gather cost info from contractors																															
Gather rental information																															
Develop land values																															
Development of new rates for SOV																															
Update new cost tables																															
Valuation testing / SR Analysis																															
Final reviews / edits																															
SOV Finished																															
Present SOV to BOC																															
Public Hearing SOV																															
Adopt SOV																															
Publish notice of adoption																															
Taxpayer deadline to appeal SOV																															
Send out Notices																															
Informal Appeals																															
BOER																															
Send out bills																															

Future Meeting Topics





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.

FY 25-26 Commissioners' Strategic Plan

FOCUS AREA 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.

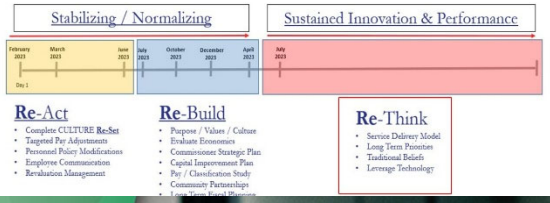
FOCUS AREA 2: ECONOMIC GROWTH & SUSTAINMENT
Promotion of Burke County as a business and economic center in the region through recruitment of new industry, creating a healthy business climate for existing businesses.

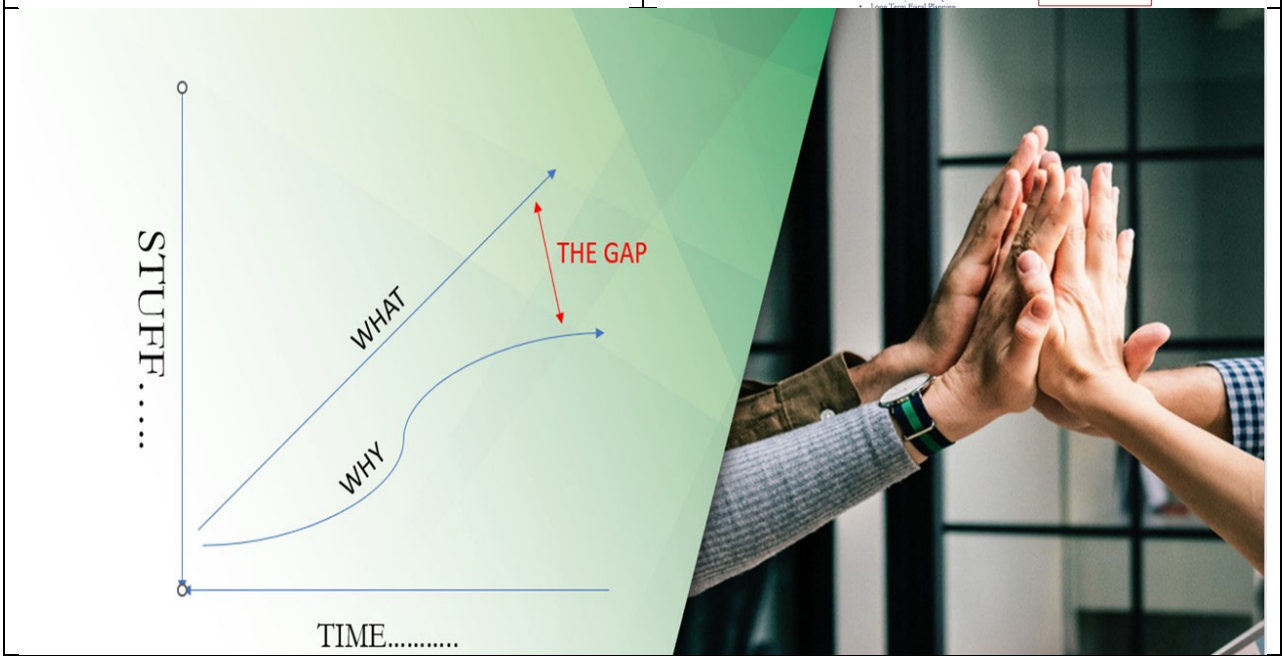
FOCUS AREA 3: PUBLIC SAFETY& WELL BEING
To ensure the safety of our residents through efficient and effective public safety agencies.

FOCUS AREA 4: FISCAL STEWARDSHIP
Pursuit of the high-performing organization model that ensures high quality, transparent and efficient use of public resources.

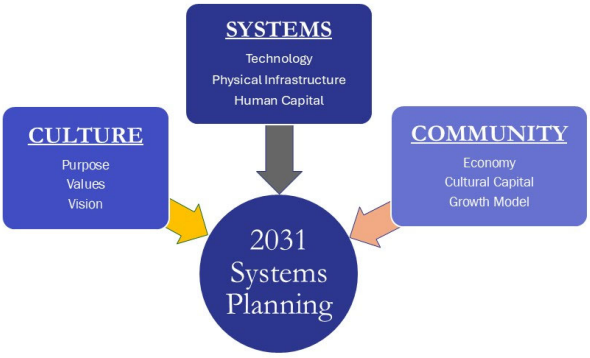
FOCUS AREA 5: EMPLOYER OF CHOICE
To promote a professional value-based employee centric workplace that promotes innovation, performance, and integrity, and differentiation.

Burke County High Performance FY 2026-2027

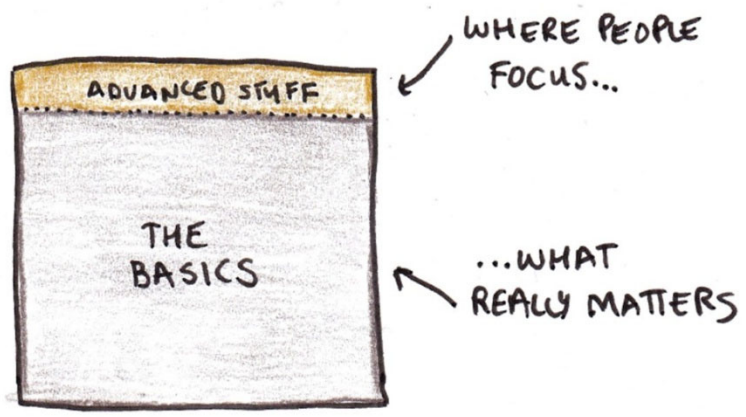




Long Term Strategy



"Don't Get Bored With The Basics"



Doing the Basics - At a High Level

1. **Financial Fundamentals**

- **Structural balance**
  - •Recurring revenues fund recurring expenses
  - •Avoid one-time revenue for ongoing operations
  - •Multi-year forecasting (3–5 years)
- **Healthy fund balance**
  - •Maintain or exceed policy goals
  - •Preserve liquidity and AAA/AA bond rating where applicable
- **Debt discipline**
  - •Align debt with capital improvement planning
  - •Maintain manageable debt service ratios
  - •Avoid crowding out operating flexibility
- **Cost containment**
  - •Offset LGERS and H.R. 1 (BBB) increase with internal efficiencies
  - •Evaluate vacancies and position ROI – Position Justification
  - •Control non-labor inflation (contracts, fuel, utilities)

Doing the Basics - At a High Level

2. Workforce & Team Stability

With labor costs and retirement contributions rising, basics include:

- Competitive but sustainable pay strategy
- Market adjustments where justified
- Clear staffing justification tied to service levels
- Investment in retention (training, internal promotion)
- Workforce planning (succession in key operational roles)

Doing the Basics - At a High Level

3. Core Service Excellence

The fundamentals residents expect every day: High performance = predictable, reliable delivery with measurable standards.

- **Public Safety**
  - Reliable response times
  - Fully staffed shifts
  - Modern equipment lifecycle
- **Public Education & Support Services**
- **Infrastructure**
  - Water/sewer reliability and regulatory compliance
  - Affordable, modern, sustainable, and operable solid waste management & compliance
- **Regulatory & Administrative Services**
  - Timely permitting and inspections
  - Clean audits with no findings
  - Transparent financial reporting
  - Procurement compliance

Doing the Basics - At a High Level

4. Capital Discipline

Basics at a high level often means: First, we fix what we own and maintain what we have.

- In a high-cost environment:
  - Prioritize maintenance over expansion
  - Fund re-use before new facilities
  - Prioritize cashflow management & salvage value proposition
  - Sequence projects based on impact and affordability
  - Protect core assets before adding amenities

Doing the Basics - At a High Level

5. Operational Efficiency

Basics at a high level often mean: Efficiency is how you absorb external cost pressures without service erosion.

- **Re-Engineering:**
  - Revenue Diversification & Maximization
  - Measured production rates by department
  - Technology upgrades that reduce manual workload
  - Cross-training staff to reduce dependency risk
  - In Source vs. Out Source
  - Cost avoidance strategies
  - Data-informed decision making

Property Tax Levy Per Capita

This map shows each county's countywide property tax levy per capita for FY 2024-25.

Data source: North Carolina Department of Revenue

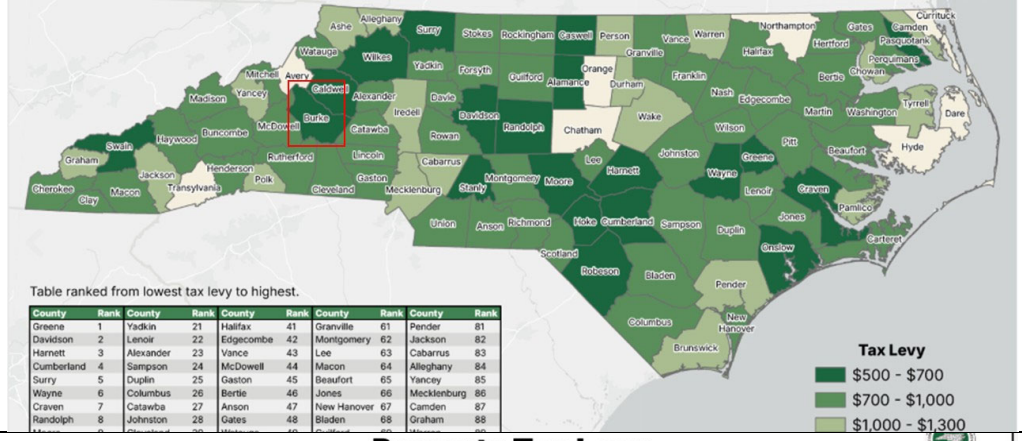


Table ranked from lowest tax levy to highest.

County	Rank	County	Rank	County	Rank	County	Rank	County	Rank
Greene	1	Yadkin	21	Halifax	41	Granville	61	Pender	81
Davidson	2	Lenoir	22	Edgecombe	42	Montgomery	62	Jackson	82
Harnett	3	Alexander	23	Vance	43	Lee	63	Cabarrus	83
Cumberland	4	Sampson	24	McDowell	44	Macon	64	Alleghany	84
Surry	5	Duplin	25	Gaston	45	Beaufort	65	Yancey	85
Wayne	6	Columbus	26	Bertie	46	Jones	66	Mecklenburg	86
Craven	7	Catawba	27	Anson	47	New Hanover	67	Camden	87
Randolph	8	Johnston	28	Gates	48	Bladen	68	Graham	88

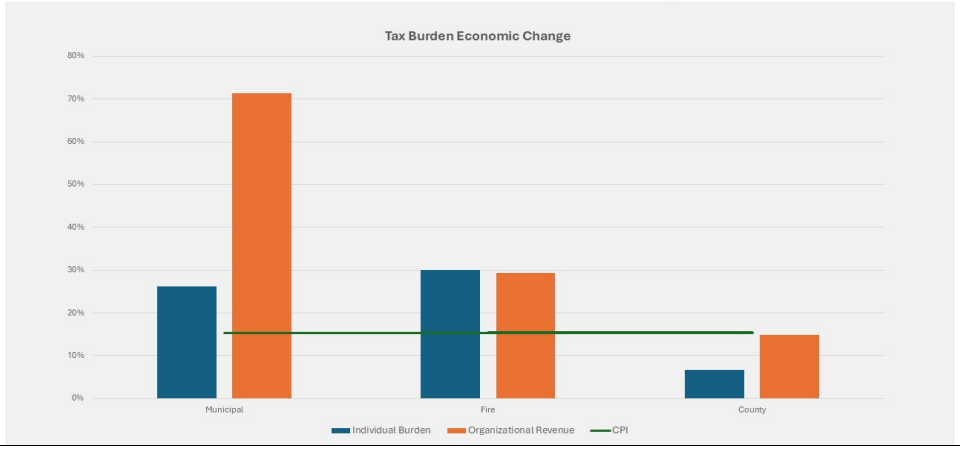
Property Tax Levy

This table shows each county's countywide property tax levy for FY 2024-25, both per capita and in total. A rank of 1 indicates the lowest levy.

Data source: North Carolina Department of Revenue and NCACC, using data from the North Carolina State Demographer's Office

	Per Capita		Total Levy			Per Capita		Total Levy			Per Capita		Total Levy	
	$	Rank	$ (M)	Rank		$	Rank	$ (M)	Rank		$	Rank	$ (M)	Rank
Alamance	$ 655	15	$ 121.3M	82	Franklin	$ 795	39	$ 66.0M	65	Pamlico	$ 1,033	78	$ 13.3M	13
Alexander	738	23	27.0	32	Gaston	837	45	206.8	90	Pasquotank	683	19	28.3	33
Alleghany	1,107	84	12.9	12	Gates	843	48	8.7	2	Pender	1,049	81	73.7	71
Anson	841	47	18.0	21	Graham	1,227	88	9.8	7	Perquimans	884	58	12.0	9
Ashe	1,009	74	26.8	30	Granville	897	61	56.3	59	Person	1,030	77	41.1	46
Avery	1,438	96	25.2	27	Greene	555	1	11.2	8	Pitt	765	31	134.7	84
Beaufort	937	65	41.1	47	Guilford	956	69	536.2	98	Polk	1,034	79	20.5	22
Bertie	841	46	13.9	14	Halifax	803	41	36.8	38	Randolph	627	8	93.3	76
Bladen	952	68	28.4	34	Harnett	597	3	88.4	75	Richmond	891	59	36.9	40
Brunswick	1,037	80	181.5	86	Haywood	875	56	56.7	60	Robeson	633	10	73.5	69
Buncombe	965	70	273.0	94	Henderson	882	57	109.0	79	Rockingham	797	40	73.6	70
Burke	672	18	61.2	62	Hertford	848	50	15.5	18	Rowan	776	34	119.7	81
Cabarrus	1,099	83	275.1	95	Hoke	657	16	37.0	41	Rutherford	769	32	50.3	56
Caldwell	671	17	55.4	58	Hyde	2,736	100	12.6	10	Sampson	747	24	45.3	52
Camden	1,191	87	12.8	11	Iredell	1,013	75	212.7	91	Scotland	793	38	26.3	29
Carteret	856	54	61.1	61	Jackson	1,067	82	48.0	55	Stanly	696	20	45.6	53
Caswell	634	11	14.2	17	Johnston	756	28	193.8	87	Stokes	792	37	36.4	37
Catawba	750	27	127.5	83	Jones	941	66	8.7	3	Surry	619	5	44.4	50
Chatham	1,366	95	115.0	80	Lee	913	63	63.9	63	Swain	640	12	8.8	4
Cherokee	852	52	25.7	28	Lenoir	734	22	39.6	44	Transylvania	1,331	94	44.7	51
Chowan	1,029	76	14.2	15	Lincoln	991	73	98.5	77	Tyrrell	1,245	91	4.3	1
Clay	787	35	9.5	6	Macon	919	64	35.7	36	Union	893	60	244.2	93
Cleveland	758	29	77.2	74	Madison	761	30	16.7	19	Vance	820	43	33.8	35
Columbus	749	26	38.6	43	Martin	850	51	17.7	20	Wake	1,285	92	1,592.1	100
Craven	627	7	64.8	64	McDowell	823	44	36.8	39	Warren	1,229	89	23.0	24
Cumberland	612	4	206.8	89	Mecklenburg	1,187	86	1,422.2	99	Washington	854	53	8.8	5

Fiscal Year 2026-2027 Budget



3 Year Re-Engineering Savings

Project	Savings
Solid Waste Subsidy	$1,306,000
Water Sewer	$520,000
Public Safety Radios Bulk Purchase	$1,266,004
Fleet Management	$90,000
Information Technology Scale Server	$69,200
Health Management – Formulary & Disease Mgt	$1,000,000
EMS Billing – In House	$1,156,787
Investment Income	$3,000,000
Total	**$8,407,991**



2025-2026 Budget Allocation by Function



Services Burke County Provides - Authorized by Statue

Department	Statue	2023 Per Capita Costs	2024 Per Capita Costs	2025 Per Capita Costs
Animal Services	N.C.G.S. 153A-442	$ 5.41	$ 6.83	$ 10.0
Cooperative Extension Services	N.C.G.S. 153A-439(a)	4.33	4.62	5.2
Detention Center	N.C.G.S. 153A-218	46.48	45.61	51.3
Economic Development	N.C.G.S. 158-23	22.12	22.60	12.6
Fire Marshal	N.C.G.S. 153A-234	0.76	0.85	1.3
Foothills Conference Center	N.C.G.S. 153A-445(7)	1.36	1.69	1.3
Library	N.C.G.S. 153A--263	16.99	17.13	23.1
Planning	N.C.G.S. 160D-201	6.19	6.85	8.4
Recreation	N.C.G.S. 153A-444	6.53	7.78	8.7
Senior Services	N.C.G.S. 153A-445(6)	5.29	5.72	6.4
Soil and Water Conservation	N.C.G.S. 153A-440	1.48	2.18	2.6
Veterans Services	N.C.G.S. 143B-1211	0.48	0.58	0.6
		$ 117.42	$ 122.44	$ 132.1

Services Burke County Provides - Required by Statue

Department	Statue	2023 Per Capita Costs	2024 Per Capita Costs	2025 Per Capita Costs
911 Communications	N.C.G.S. 143B-1406(h)	$ 23.00	$ 26.84	$ 35.3
Board of Commissioners	N.C.G.S. 153A-12	2.16	3.98	5.3
Board of Elections	N.C.G.S. 163-37	5.36	5.02	7.7
Building Inspections	N.C.G.S. 160D-1102(a)	6.62	5.13	7.0
Emergency Management	N.C.G.S. 166A-19.15(a)	4.46	4.51	6.1
Emergency Medical Services	N.C.G.S. 143-517	75.60	77.81	54.0
Environmental Health	N.C.G.S. 130A-248	2.99	3.25	6.7
Medical Examiner	N.C.G.S. 130A-381	1.41	1.43	1.4
Mental Health - Developmental Disabilities	N.C.G.S. 122C-115(a)	2.29	2.34	2.3
Human Resources	N.C.G.S. 153A-92	6.77	9.86	10.2
Public Health	N.C.G.S. 160-34(b)	34.82	36.23	41.6
Public Records	N.C.G.S. 132-1	0.13	0.16	0.1
Register of Deeds	N.C.G.S. 161-1	5.23	5.57	6.3
Sheriff	NC Constitution Art. VII Section 2	58.97	94.60	111.1
Social Serivces	N.C.G.S. 153A-255	202.45	199.76	206.2
Tax Administration and Collections	N.C.G.S. 105-296	16.13	16.30	22.8
		$ 448.39	$ 492.79	$ 524.7

FY 26-27 County Budget Analysis

Commitment to High Performance

Be clear about priorities

Allocate resources towards those priorities



Measure performance to carry out the funded programs

Evaluate performance in terms of outcomes

Fiscal Year 2026-2027 Budget

Projected Natural Growth	New Revenue
$ 336,336,272	$ 1,838,666





Class A Industrial Shell Building Program



Airport T-Hanger Projects

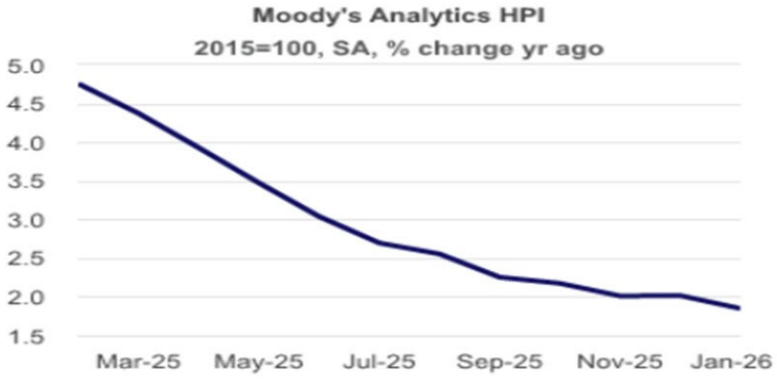
Fiscal Year 2026-2027 Budget

BURKE COUNTY, NORTH CAROLINA
Principal Property Tax Payers

Taxpayer	Type of Business	Assessed Valuation	Rank	Percentage of Total Vaulation
Duke Energy Corp	Utility	$ 216,604,311	1	1.90%
Continental Automotive Systems	Manufacturing	126,014,669	2	1.11%
Blue Ridge Healthcare Systems	Healthcare	55,161,785	3	0.48%
Leviton Manufacturing Co LLC	Manufacturing	52,076,473	4	0.46%
Rutherford Electric Membership Corp	Utility	47,522,055	5	0.42%
Gerresheimer Glass, Inc.	Manufacturing	45,773,416	6	0.40%
SGL Carbon LLC	Manufacturing	42,283,467	7	0.37%
Unix Packaging	Manufacturing	38,332,791	8	0.34%
CCHU Morganton LLC	Real Estate	36,772,814	9	0.32%
ARG MHMORNC001 LLC	Manufacturing	36,552,211	10	0.32%
Totals		$ 697,093,992		6.11%

Source: Burke County Tax Department

According to the Moody's Analytics House Price Index, monthly house price appreciation decelerated in January, and prices rose by 0.3% over the month. Over the last 12 months, annual house price growth fell from 4.9% to 1.9%. House prices in 10 states declined, up from eight in the prior month, and weakness was concentrated in the West and South. Prices in nine of the 10 largest metro areas increased over the year. Chicago, New York and Philadelphia were the fastest growing over the year, while Phoenix was down slightly from a year ago.



Burke County

North Carolina

	March			Year to Date		
Key Metrics	**2023**	**2024**	Percent Change	**Thru 3-2023**	**Thru 3-2024**	Percent Change
New Listings	97	**106**	+ 9.3%	229	**266**	+ 16.2%
Pending Sales	88	**88**	0.0%	216	**217**	+ 0.5%
Closed Sales	76	**63**	- 17.1%	167	**160**	- 4.2%
Median Sales Price*	$233,825	**$270,000**	+ 15.5%	$245,000	**$240,000**	- 2.0%
Average Sales Price*	$266,269	**$277,723**	+ 4.3%	$286,222	**$275,528**	- 3.7%
Percent of Original List Price Received*	95.4%	**95.0%**	- 0.4%	95.4%	**93.9%**	- 1.6%
List to Close	93	**79**	- 15.1%	88	**82**	- 6.8%
Days on Market Until Sale	36	**38**	+ 5.6%	40	**41**	+ 2.5%
Cumulative Days on Market Until Sale	41	**41**	0.0%	45	**44**	- 2.2%
Average List Price	$326,943	**$403,223**	+ 23.3%	$315,098	**$357,859**	+ 13.6%
Inventory of Homes for Sale	107	**158**	+ 47.7%	--	--	--
Months Supply of Inventory	1.6	**2.4**	+ 50.0%	--	--	--

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

Burke County

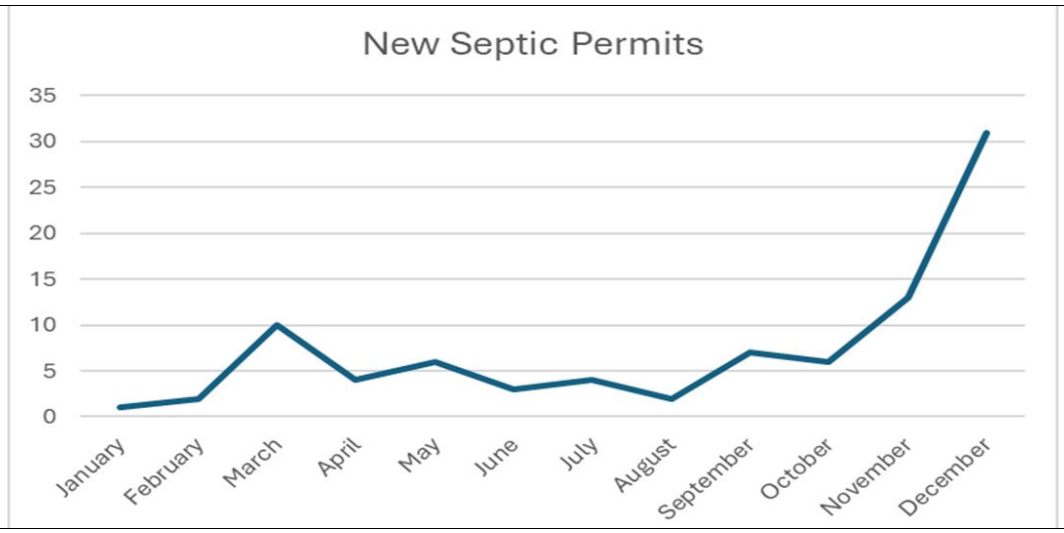
North Carolina

	January			Year to Date		
Key Metrics	**2025**	**2026**	Percent Change	**Thru 1-2025**	**Thru 1-2026**	Percent Change
New Listings	63	**72**	+ 14.3%	63	**72**	+ 14.3%
Pending Sales	48	**61**	+ 27.1%	48	**61**	+ 27.1%
Closed Sales	57	**37**	- 35.1%	57	**37**	- 35.1%
Median Sales Price*	$262,500	**$285,000**	+ 8.6%	$262,500	**$285,000**	+ 8.6%
Average Sales Price*	$375,271	**$351,091**	- 6.4%	$375,271	**$351,091**	- 6.4%
Percent of Original List Price Received*	91.7%	**92.5%**	+ 0.9%	91.7%	**92.5%**	+ 0.9%
List to Close	113	**129**	+ 14.2%	113	**129**	+ 14.2%
Days on Market Until Sale	79	**83**	+ 5.1%	79	**83**	+ 5.1%
Cumulative Days on Market Until Sale	87	**95**	+ 9.2%	87	**95**	+ 9.2%
Average List Price	$313,943	**$376,448**	+ 19.9%	$313,943	**$376,448**	+ 19.9%
Inventory of Homes for Sale	216	**207**	- 4.2%	--	--	--
Months Supply of Inventory	3.3	**3.2**	- 3.0%	--	--	--

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

Burke County – Non-Industrial Capital Investment

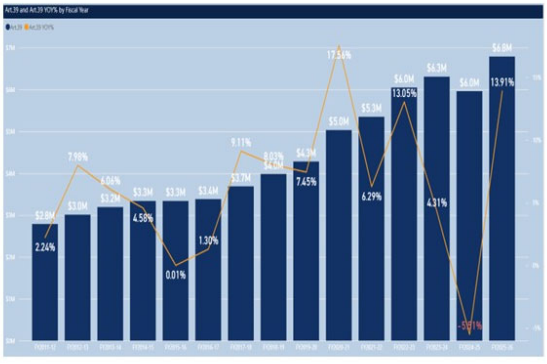
Permits	2025	2024	% change
Single Family	401	251	**60%**
Building permits- all types	2,813	2,283	**23%**
Duplex units	15	8	**87%**
Manufactured Homes	156	105	**48%**
Plat Review	134	69	**94%**
Zoning Permits	1,397	1268	**10%**



U.S. manufacturing activity expanded again in February. The ISM manufacturing index ticked down from 52.6 in January to 52.4 in February but remained in expansion for a second consecutive month. The details were mixed. The new orders and production indexes both fell on the month but held in expansionary territory. Meanwhile, the employment index increased but remained in contraction.



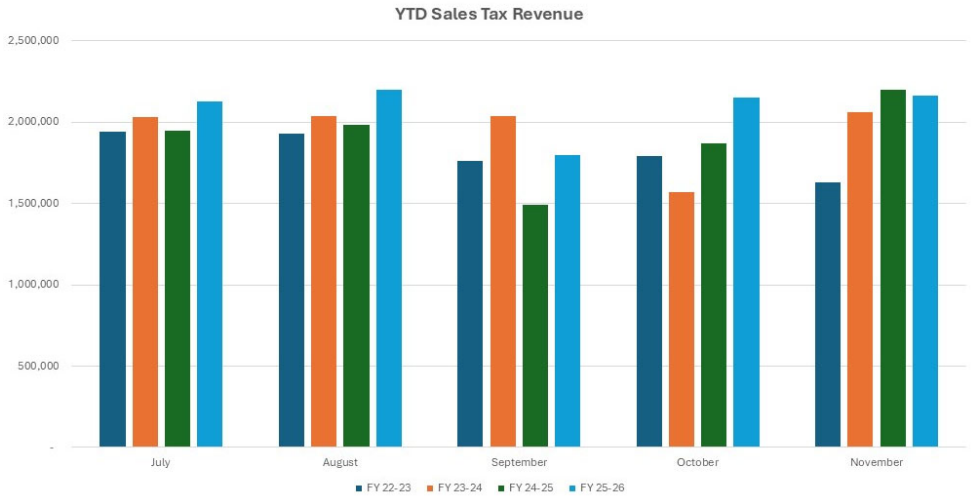
ARTICLE 39 SALES TAX - POS



ARTICLE 40 & 42 SALES TAX



- Year to date……$10,436,021 (+ 10%)



FY 2026-2027 Budget Re-Engineering

	Strategy	Amount & Impact
1.	EMS Billing……..	$ 350,000 Increased Revenue
2.	Position Justification……..	$ 75,000 Decreased Cost
3.	DSS Revenue Maximization……..	$ 300,000 Administrative Reimbursement
4.	Public School Nurses……..	$ TBD
5.	Water/Sewer Spoilage Retention……..	$ 100,000 Decreased Cost
	Total Budget Flexibility	**$ 825,000**

Hospital Contracting – Interfacility Transport

AMBULANCE TRANSPORT SERVICES AGREEMENT
(POST-DISCHARGE, NON-MEDICAL NECESSITY)

This Ambulance Transport Services Agreement (the "Agreement") is entered into as of January 1, 2026 (the "Effective Date") by and between BURKE COUNTY, NORTH CAROLINA, acting by and through its Emergency Medical Services department ("Burke EMS"), and BLUE RIDGE HEALTHCARE HOSPITALS, INC. ("Hospital"). Burke EMS and Hospital are each a "Party" and together the "Parties."

1. Purpose and Scope

1.1 Limited Scope. This Agreement applies only to: (a) non-emergency, post-discharge ambulance transports that are not medically necessary (each, a "Non-Medical Necessity Transport" or "NMN Transport"); and (b) non-emergency, post-discharge wheelchair transports for clinically discharged patients who do not require stretcher transport or ambulance-level care (each, a "Wheelchair Transport"), originating from Hospital or Hospital-designated facilities.

1.2 Exclusions. This Agreement does not cover: emergency transports; inter-facility transfers based on medical necessity; any transport for which third-party coverage is sought based on medical necessity; or any patient whose medical condition requires ambulance transport at the BLS or ALS level of service. If a patient scheduled for Wheelchair Transport is determined, at or prior to transport, to require ambulance transport due to an existing or emergent medical condition, the transport shall be provided at the appropriate BLS or ALS level and billed in accordance with Section 4.2 at the applicable NMN Rate.

2. Ordering and Authorization

2.1 Hospital Request Required. Burke EMS shall provide transports only upon the request of an Authorized Hospital Representative (defined as nursing leadership, case management, patient flow/throughput, or other individuals designated in writing by Hospital).

2.2 Patient Condition. NMN Transports frequently involve stretcher-bound patients and are performed for patient comfort, logistics, or discharge disposition—not due to medical necessity. Wheelchair Transports involve patients who are medically stable, do not require stretcher transport, and do not require monitoring or medical intervention during transport. Hospital acknowledges these transports are not medically necessary.

2.3 Information to Provide. With each request, Hospital will provide: patient name/identifier, pickup location, destination, requested pickup time window, contact information for the Authorized Hospital Representative, and any relevant safety/mobility considerations.

AGREEMENT FOR NON-EMERGENCY INTRAFACILITY TRANSPORTATION

This Agreement for Non-Emergency Intra-Facility Medical Transportation (the "Agreement") is entered into as of the date shown below between **Blue Ridge HealthCare Hospitals, Inc. (the "Facility") and Burke County, North Carolina (the "County").**

Recitals:

WHEREAS, the Facility is a multi-campus hospital operating under a single license and single CMS Certification Number in Burke County, North Carolina; and

WHEREAS, the County is a public entity that owns and operates, pursuant to N.C.G.S. § 153A-149(c)(5) and other statutes and regulations, an emergency and non-emergency medical transportation services division in Burke County, North Carolina; and

WHEREAS, the Facility seeks non-emergency transportation services for its patients, specifically between its Valdese Campus (located at 720 Malcolm Boulevard in Valdese) and its Morganton Campus (located at 2201 S. Sterling Street in Morganton); and

WHEREAS, the County, after having negotiated the terms and conditions of this Agreement, is willing to provide these services.

NOW, THEREFORE, in consideration of the above set forth premises, the agreements contained herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto agree as follows:

1. Services Provided

The County shall provide non-emergency ambulance transportation services for patients of the Facility in two distinct categories (collectively, the "Services"):

a. **In-County Interfacility Transfers (Valdese Campus to Morganton Campus)**

These Services include the non-emergency transport of patients between the Facility's Valdese and Morganton campuses. Such transfers are typically inpatient in nature and shall be provided 24 hours per day, 7 days per week, upon request by a physician, employee, or other authorized representative of the Facility ("Request"). These transfers shall follow the priority coding and response times set forth in **Exhibit A** and may be rendered at either the Basic Life Support (BLS) or Advanced Life Support (ALS) level, depending on the medical needs of the patient.

The County shall provide the Services as expeditiously as possible based on resource availability, as determined in its sole discretion.

b. **Out-of-County Interfacility Transfers**

These Services consist of emergency and non-emergency patient transports from the Facility to locations outside of Burke County. Such transfers shall also follow the

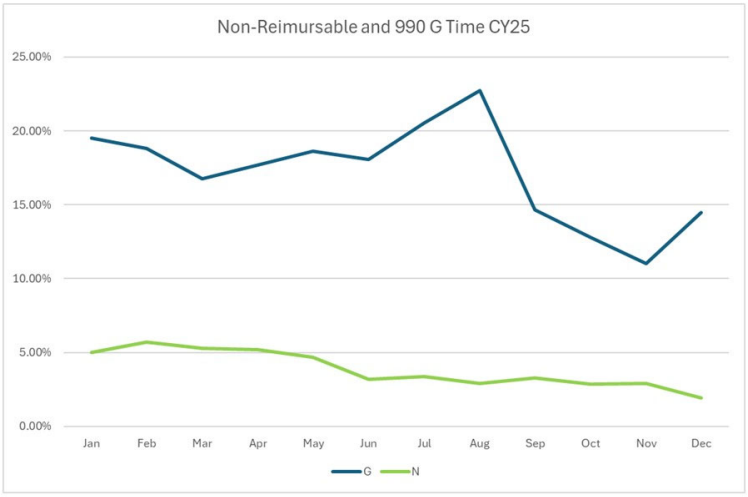
DSS – 1571 Revenue Maximization

BURKE COUNTY, NORTH CAROLINA
PARTICIPATION IN BUDGETED COUNTY EXPENDITURES
11/12/2025

100-52000-01-433440-

	FY-23-24				FY-24-25				FY-25-26			
	Amount requested 1571	Revenue Received Per GL	% Received		Amount requested 1571	Revenue Received Per GL	% Received		Amount requested 1571	Revenue Received Per GL	% Received
7/1/2023	$ 1,353,953.46	$ (926,177.72)	68.41%	7/1/2024	$ 1,389,239.21	$ (1,107,894.05)	79.75%	7/1/2025	$ 1,905,995.05	$ (1,183,638.14)	62.10%
8/1/2023	$ 1,369,494.91	$ (725,233.21)	52.96%	8/1/2024	$ 1,453,487.79	$ (960,603.97)	66.09%	8/1/2025	$ 1,465,778.86	$ (1,199,154.65)	81.81%
9/1/2023	$ 1,510,729.02	$ (772,544.71)	51.14%	9/1/2024	$ 1,453,487.79	$ (760,275.53)	52.31%	9/1/2025	$ 2,011,967.07	$ (920,445.04)	45.75%
10/1/2023	$ 1,330,771.80	$ (840,517.21)	63.16%	10/1/2024	$ 1,477,379.64	$ (892,246.74)	60.39%	10/1/2025	$ 2,472,758.33	$ (1,083,474.60)	43.82%
11/1/2023	$ 1,467,130.18	$ (636,693.46)	43.40%	11/1/2024	$ 2,108,119.89	$ (97,203.74)	4.61%	11/1/2025	$ 1,866,875.11	$ (711,990.57)	38.85%
12/1/2023	$ 2,027,937.69	$ (545,102.36)	26.88%	12/1/2024	$ 1,660,003.42	$ (699,397.58)	42.13%	12/1/2025	$ 1,832,531.88	$ (830,245.24)	46.70%
1/1/2024	$ 1,350,570.83	$ (1,108,142.68)	82.05%	1/1/2025	$ 1,661,008.01	$ (859,451.68)	51.74%	1/1/2026	$ 1,777,950.74		#DIV/0!
2/1/2024	$ 1,411,274.46	$ (489,372.92)	34.68%	2/1/2025	$ 1,457,045.61	$ (681,678.97)	46.79%	2/1/2026			#DIV/0!
3/1/2024	$ 1,543,188.15	$ (553,584.82)	35.87%	3/1/2025	$ 1,554,893.71	$ (644,856.35)	41.47%	3/1/2026			#DIV/0!
4/1/2024	$ 1,421,073.38	$ (870,513.10)	61.26%	4/1/2025	$ 1,581,446.59	$ (790,648.03)	50.00%	4/1/2026			#DIV/0!
5/1/2024	$ 1,879,528.47	$ (581,046.03)	30.91%	5/1/2025	$ 3,471,738.05	$ (773,928.36)	22.29%	5/1/2026			#DIV/0!
6/1/2024	$ 1,606,025.97	$ (744,233.27)	46.34%	6/1/2025	$ 1,647,504.99	$ (1,248,913.75)	75.81%	6/1/2026			#DIV/0!
	$ 18,271,678.32	$ (8,793,161.49)			$ 20,915,354.70	$ (9,517,098.75)				$ (5,928,948.24)	

Maximizing State Reimbursement



DSS – 1571 Revenue Maximization

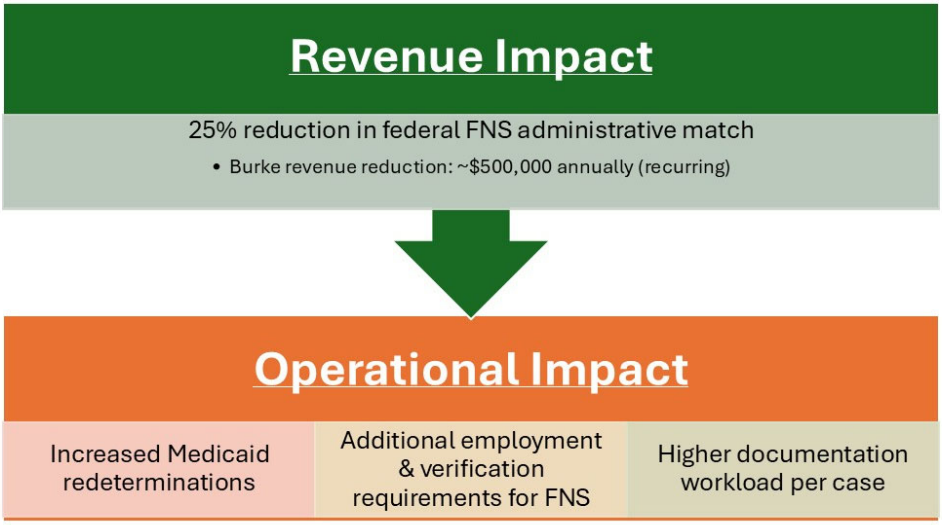
FY-23-24		
Applied For	Reimbursed	Reimbursed %
$ 9,060,017.06	$ (4,121,268.67)	-45%

FY-24-25		
Applied For	Reimbursed	Reimbursed %
$ 9,541,717.74	$ (4,517,621.61)	-47%

FY-25-26		
Applied For	Reimbursed	Reimbursed %
$ 11,271,153.30	$ (5,928,948.24)	-53%

*47% - 53%.....$750,000 - $1,000,000

H.R. 1: Dual Impact on Counties



What This Means for Burke DSS

- Increased redeterminations and case actions
  - More verification = more staff time per case
  - Higher compliance pressure
  - Likely request for additional FTE if no operational change
  - 10/1/2026 (FY27) Material Decrease in Revenue and increase in DHHS local subsidy

Fiscal Year 2026-2027 Budget

FY 26-27 New Available Dollars:

Net New Property Tax Revenue	$ 1,800,000
Sales Tax Growth (3.0%)	$ 650,000
Re-Engineering	$ 425,000
DSS Revenue Maximization (net)	$ 300,000
H.R. 1 SNAP Admin Cost Shift	$ -($500,000)
Total Budget Flexibility	**$ 2,675,000**

Expense Budget Considerations:

In House Pay & Mkt Study

- In-House Study to Ensure salary ranges are market competitive
- Identify areas in our region where we should target to talent acquisition
- Identify internal pay compression issues that need further review

Scope and Purpose

Key Positions

- 911 Telecommunicator
- Paramedic
- Deputy Sheriff
- Detention Officer
- IMC
- Social Worker
- Public Health Nurse
- Environmental Health Specialist
- Maintenance Tech

Peer Counties:
Alexander
Buncombe
Caldwell
Catawba
Cleveland
Gaston
Iredell
Lincoln

What are we Analyzing?

- Range Comparison
  - Starting Rates
  - Midpoint Differentials
  - Range Spread %
- Actual Pay Comparison
  - Current pay rates by position
  - % Above Minimum based on tenure (Compression)
- Tenure Comparison

Outcomes Across All Positions

Highlights:

- Burke is 2.52% above on Average Range Minimums
- Burke is 43.42% below on Average Tenure
- Ranges still ahead of market from Pay and Classification Study (July 2024)
- Experiencing Pay Compression, likely due to low Tenure
- We are competitive in recruitment, especially for entry level candidates
- Career Ladder implementation has assisted in combatting compression in certain areas

Employee Wellness Fund – Claims Experience

Experience Summary	2024-25	2025-26	Δ from Prior
Net Paid Claims	$6,411,426	$3,883,615	21.1%
Actual Net Cost	$7,775,878	$4,603,955	18.4%
FIE	$7,517,970	$4,053,930	
Net Position to FIE	103.4%	113.6%	10.1%
Gross Rx Claims to Total Gross Claims	43.1%	38.0%	
Net Claims PEPY	$9,362	$12,406	32.5%
Average Employees	685	689	0.6%

Observations

For the current experience period of Jul 1, 2025 to Dec 31, 2025, the group is currently performing unfavorably based on the following:

- Claims net of amounts over the SSL decreased 21.1% over the prior year. This is above the medical trend of 10%.
- Prescription drug claims currently account for 38.0% of total claims. This is higher than average.
- There are several large claimants over $62,500, making up 28.8% of the total claims. Typically, high cost claimants make up 20% to 35% of total claims.
- Average number of employees has increased by 0.6% compared to the prior year.

Large Claimants	2024-25	2025-26
Number of Large Claimants (>$62,500)	22	13
Total Paid for Large Claimants (>$62,500)	$2,631,016	$1,318,710
Claimants Over SSL (>$125,000)	8	2
Total Paid Over SSL (>$125,000)	$433,122	$85,206

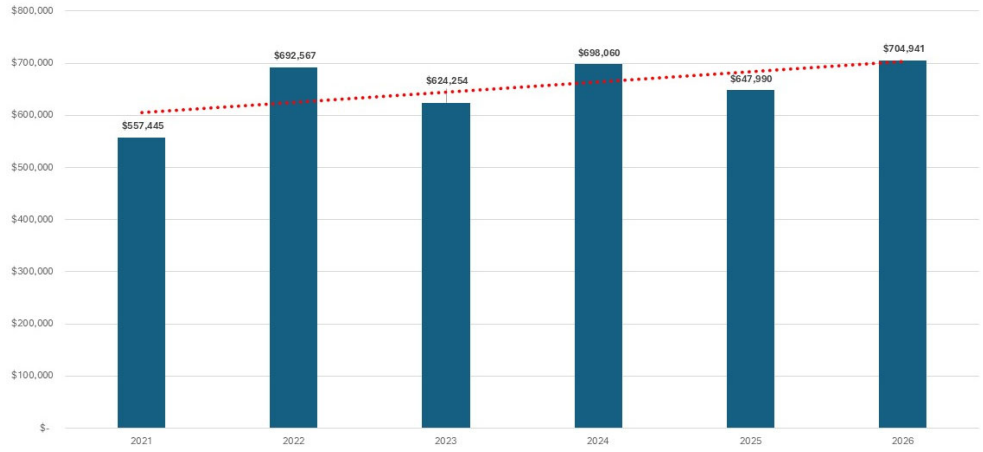
Note: Omits aggregating specific, if applicable.

Burke County
Medical / Rx Plan - BCBSNC/BCBSNC
Current Plan Year Large Claimant Report
July 2025 to June 2026

Paid Claims > $62,500

Claimant	Relationship	Diagnosis	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Total Paid
1	Employee	Other hematologic diseases			$84,036	$8,440	$2,700	$314	$5,088						$100,579
2	Spouse	Malignant neoplasm of central nervous system				$117,440	$33,886	$56,683	$74,053						$282,062
3	Employee	Other inflammation of intestines & abdomen				$80,010	$1,703	$45,484	$4,415						$131,612
4	Employee	Chronic renal failure				$76,507	$18,559	$18,031	$20,593						$133,690
5	Employee	Closed fracture or dislocation of lower extremity - foot & ankle				$66,852	$0	$0	$0						$66,852
6	Employee	Joint degeneration, localized - back				$66,296	$5,218	$2,565	$19,745						$93,824
7	Employee	Other inflammation of skin				$63,432	$16,688	$13,960	$3,146						$97,227
8	Employee	Psoriasis					$81,678	$15,175	$16,341						$113,194
9	Employee	Malignant neoplasm of breast					$81,517	$15,612	$1,919						$99,048
10	Employee	Inflammatory bowel disease					$69,940	$16,059	$16,265						$102,264
11	Employee	Severe heart block						$96,782	$1,267						$98,049
12	Employee	Inflammatory bowel disease						$95,047	$10,415						$105,462
13	Employee	Leukemia						$68,096	$23,858						$91,954
14 - NEW	Employee	Other infectious diseases							$120,126						$120,126
15 - NEW	Employee	Closed fracture or dislocation of lower extremity - foot & ankle							$67,629						$67,629
16 - NEW	Employee	Other inflammation of skin							$65,607						$65,607
		Total	$0	$0	$84,036	$478,978	$311,890	$443,806	$450,468	$0	$0	$0	$0	$0	$1,769,178

Average Monthly Costs

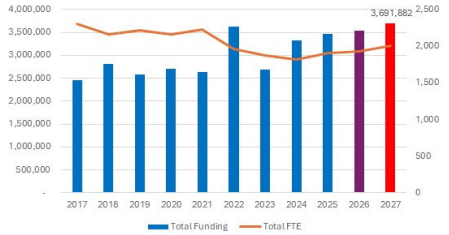


WPCC Budget Request

WPCC – Request 9.1% increase in operations……..(+) $283k
Flat Capital Allocation……..……..…$425,000

- The increase is primarily the result of anticipated salary and benefit increases of 4% along with increases for insurance, utilities, and small repair/renovation projects and to cover repairs to facilities, necessary renovations, and maintenance of over 40 structures and 300 acres.

Total Funding FY 17 - 27



WPCC Operating and Capital Budgeting - Per FTE



Recommended $150,000 (4.32%)

Fiscal Year 2026-2027 Budget

FY 26-27 Strategic Plan Budget Considerations:

Employee Compensation (1.5%) (July/January)	$ 900,000
North Carolina Treasury Rate Increase (1%)	$ 400,000
Employee Wellness (6.0%)	$ 500,000
Public Education Funding (3.0%)	$ 600,000
Community College Funding (4%)	$ 150,000
Commissioner Prioritization	$ 125,000
Total Strategic Plan Considerations	**$ 2,675,000**

Legislative Priority Considerations

1. Indian Hills Sewer Lift Station – Elevate and Expand……..$10,000,000

2. Occupancy Tax Revenue Sharing Agreement Modifications…….$ TBD

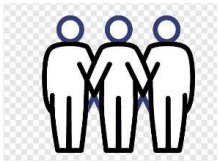
3. Continued Utilization of Industrial Shell Building Funding……..$ TBD

BUDGET PRIORITIZATION EXERCISE

BOC - STRATEGIC PRIORITIZATION ACTIVITY

The Commissioners were invited to engage in a strategic prioritization activity by placing dots on items of high value or high priority. Each Commissioner received 11 dots, and the results were as follows:

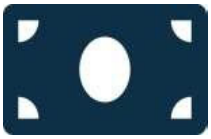
Note: The underlined text represents write-ins made by Board members.



FOCUS AREA 1: COMMUNITY ADVANCEMENT
FY 26-27 GOALS

1. Leverage the completed housing assessment to promote new product development, including developing modernized land use and zoning administration plans. 🟡🟢
2. Modernize, streamline and simplify land use and zoning administration plans and 🟠

explore workflow permitting technology.
3. Sustain and expand Burke County citizens academy.
4. Fully implement existing GREAT and CAB grants to ensure more than 90 percent household coverage for high-speed broadband internet.
5. Community Beautification Strategies, including roadside litter cleanup efforts. 🟢 Suckers / GRAP
6. Develop local and long-term municipal MOUs and reduce unaccounted for water / wastewater. Implement volume-based municipal billing. 🔵🟢🟡🔴
7. Expand public school funding and operational support.
8. Prioritize trail development and parks / recreation support.
9. Increase citizen engagement & participation on county boards and committees.
10. Invest in and improve foster case systems in Burke County including vertically integrated licensing, foster parent support, GAL advocacy, judicial priority, and develop key performance indicators. 🟡🔴🟢



FOCUS AREA 2: ECONOMIC DEVELOPMENT FY 26-27 GOALS

1. Investment and promotion of economic development assets and products, including property acquisition, water/sewer development, and workforce development. 🟠🔵🟡🔴🟢🟡
2. Evaluate economic impact and future partnerships for increased development of Hickory Regional Airport. 🟢🟠🟡
3. Completion of industrial shell building and natural gas infrastructure inside Business Burke Park.🟡🔴
4. Implement economic development promotion strategies and advanced marketing with NCEDO, NC Department of Commerce and other regional site location strategies.
5. Business friendly public policy and innovative support for existing industry and business expansion.🔴🟢
6. Jointly adopted marketing and recruitment strategic plan with BDI. 🔴



FOCUS AREA 3: PUBLIC SAFETY & WELL BEING FY 26-27 GOALS

1. Implement recommendations of public safety strategic plan and improve performance metrics.🔵🔴🟡
2. Effective local use of opioid settlement funding and LME/MCO capital grant.🔴
3. Proactive approach to cleaning up dilapidated properties and educating citizens on existing solid waste ordinances and policies.🔵
4. Continue support for all VFDs, including strategies that lower DOI ratings. (i.e. daytime staffing, satellite stations, municipal hydrant expansion, etc.)
5. Promote innovative public health strategies that produce and improve overall community health ranking. 🔵
6. Successful operational transition to new Animal Services and Emergency Services buildings.
7. Opioid funding abatement strategies that promote prevention, building a recovery

ecosystem, and reduction of overdose deaths. a



FOCUS AREA 4: FISCAL STEWARDSHIP
FY 26-27 GOALS

1. Maintain a minimum fund balance policy of 25 percent to ensure stability in the financial health of Burke County.
2. Invest in exploratory engineering and site evaluation of a Burke County Municipal Solid Waste(MSW) Cell Development.
3. Budget re-engineering strategies that utilize lean operational principles. Prioritize maximizing efficiency and balancing organizational performance and lowering tax rate.
4. Identify and pursue available national / state grant funding.
5. Implementation of a Comprehensive Capital Improvement and Master Facility Plan, including funding policies, project timelines, execution strategies, and DHHS building renovations.
6. Maintain existing industry best practices and financial policies, including debt management parameters.
7. Maximize DSS cost recovery strategies.
8. Business model review and recommendations to ensure self-sustainment for Burke County's enterprise funds. Begin implementation of water / sewer CIP and rate stabilization study.
9. Engage in transparent and data-drive tax revaluation process and begin planning software conversion post-2027.
10. Leverage and prioritize Indian Hills Pump Station and occupancy tax distribution as top legislative goals.



FOCUS AREA 5: EMPLOYER OF CHOICE
FY 26-27 GOALS

1. Pursue substantial equivalency (OSHR) and modernization of all Burke County personnel policies.
2. Maintain market-driven wages with a focus on competitiveness, value add propositions, and cost sustainability.
3. Sustain high-talented employee recruitment and retention efforts with talent retention rates at or above 90%.
4. Successful recruitment and onboarding of key department leaders.
5. Results and incentive-based wellness programming with a goal of cost reduction.
6. Employee focused training and development plans.

Note: Vice Chairman Smith left the meeting after the Strategic Prioritization Activity due to business-related travel at 4:30 p.m. and was not present for the remainder of the meeting.

CLOSING STATEMENTS

BOC - CLOSING STATEMENTS FROM COMMISSIONERS

Chairman Brittain opened the floor for closing remarks. The Board expressed its appreciation to County staff for their hard work and dedication throughout the strategic planning and budget process. Commissioner Barrier noted that projects not selected as immediate priorities remained important and would continue to receive attention, while Chairman Brittain emphasized that the strategic planning process helps ensure County priorities are addressed effectively and efficiently.

CANCELLATION OF MARCH 6 BUDGET MEETING

BOC - CONSIDERATION OF CANCELLATION OF THE MARCH 6, 2026, BUDGET & STRATEGIC PLANNING WORK SESSION

During the adoption of the Board of Commissioners' 2026 Meeting Schedule Resolution, the Budget & Strategic Planning Work Session was scheduled for two (2) days, consistent with prior years. As the Board completed all scheduled business during the March 5, 2026, work session, the March 6, 2026, session is no longer necessary.

Motion: To cancel the March 6, 2026, Budget & Strategic Planning Work Session.

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 4:45 p.m.

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

Approved this 20th day of July 2026.

_____
Randy Burns, Acting Chair
Burke Co. Board of Commissioners

Attest:

_____
Morgan Buchanan
Clerk to the Board of Commissioners