Town of Montreat
Board of Commissioners Meeting – Public Forum
June 11, 2026 – 5:30 p.m.
Town Hall

I. Call to Order

- Welcome
- Moment of Silence

II. Agenda Adoption

III. Public Comments

IV. Adjournment

Town of Montreat
Board of Commissioners
Town Council Meeting
June 11, 2026 – 6:00 p.m.
Town Hall

I. Call to Order

- Pledge of Allegiance
- Moment of Silence

II. Agenda Adoption

III. Mayor's Communications

IV. Consent Agenda

A. Meeting Minutes Adoption

- April 9, 2026, Public Forum Meeting Minutes
- April 9, 2026, Regular Meeting Minutes
- April 10, 2026, Budget Workshop #2 Meeting Minutes
- May 1, 2026, BOC/Sign Subcommittee Joint Workshop Meeting Minutes
- May 8, 2026, Budget Workshop #3 Meeting Minutes

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

V. Town Manager's Communications

- Consent Agenda Review
- Other Items

VI. Administrative Reports – April/May

- Administration
- Planning and Zoning
- Public Works and Water
- Sanitation
- Streets
- Finance
- Police
- Permitting/Inspection Data from Buncombe County

VII. Public Comment

Public comments will be heard during this period for <u>any and all items.</u>

VIII. Old Business

IX. New Business

A. Oath of Office

- Chief Justyn Whitson

B. Flat Creek Crossing Update

- **Presenters:** Jean Norris & Eric Nichols
- PowerPoint Presentation

C. Fire District Tax Resolution

- **Presenter:** Savannah Parrish
- **See Agenda Materials on page 70**
- ***<u>Suggested Motion</u>: Move to approve/deny Resolution #26-06-0001***

D. Discussion on Establishing a Brokerage Account

- **Presenter:** Commissioner Mason Blake
- **See Agenda Materials: on pages 71-72**

E. Discussion & Possible Action of Carter, P.C. Contract and Engagement Letter

- **Presenter:** Rachel Eddings
- **See Agenda Materials on pages 73-92**
- ***<u>Suggested Motion</u>: Move to approve/deny Carter, P.C. Contract and Engagement Letter***

F. Appointment of Kathy Putnam as an ex officio member of the Stone Bridge Advisory Committee

- **Presenter:** Savannah Parrish
- ***Suggested* Motion: *Move to appoint/deny Kathy Putnam as ex officio member of the Stone Bridge Advisory Committee***

G. Discussion & Approval of Solid Waste & Recycling Collection

- **Presenter:** Savannah Parrish, Barry Creasman, & Rachel Eddings
- **See Agenda Materials on pages 93-121**
- ***Suggested Motion*: *Move to approve/deny the selection and contract signing of a Solid Waste & Recycling Collection Service Provider***

H. Review of FY26-27 Town of Montreat Budget & Public Hearing

- **Presenter:** Savannah Parrish
- **See Agenda Materials on pages 122-137**
- ***Suggested Motion*: *Move to open/close Public Hearing***

I. FY26-27 Budget Ordinance

- **Presenter:** Savannah Parrish
- **See Agenda Materials on pages 138-146**
- ***Suggested Motion*: *Move to approve/deny the FY26-27 Budget Ordinance and Fee Schedule as presented/amended***

J. Budget Amendment #15

- **Presenter:** Savannah Parrish
- **See Agenda Materials on page 147**
- ***Suggested Motion:* *Move to approve/deny Budget Amendment #15***

K. Budget Amendment #16

- **Presenter:** Savannah Parrish
- **See Agenda Materials on page 148**

- ***Suggested Motion:*** ***Move to approve/deny Budget Amendment #16***

L. Budget Amendment #17

- **Presenter:** Savannah Parrish
- **See Agenda Materials on page 149**
- ***Suggested Motion:*** ***Move to approve/deny Budget Amendment #17: the movement of funds and payment of outstanding dumpster contractor fees and outstanding attorney fees***

LI. Discussion of Chestnut Tree Project

- **Presenter:** Savannah Parrish & Commissioner Mason Blake

X. Public Comment

Public comments will be heard during this period for any and all items.

XI. Commissioner Communications

XII. Dates to Remember

- **Landcare – No July Meeting**
- **Town Offices Closed, Friday, July 3, 2026**
- **Bulk Items/White Goods Pickup, Tuesday, July 7, 2026, at your curb –for more information on what is included visit:** Sanitation - Town Of Montreat
- **July Town Council Meeting, Thursday, July 9, 2026, 6:00 pm in Town Hall with Zoom options. Public Forum will begin at 5:30 pm**
- **Tree Board, Tuesday, July 14, 2026, 9:00 am – 11:00 am in Town Hall with Zoom options**
- **Planning & Zoning Commission, Thursday, July 16, 2026, 10:30 am – 12:00 pm in Town Hall with Zoom options**
- **Board of Adjustment, Thursday, July 23, 2026, 5:00 pm in Town Hall with Zoom options (if needed)**

XIII. Closed Session

- ***Suggestion Motion*****:** ***To enter into Closed Session in accordance with NCGS §143-318.11(6) for discussion of a personnel matter***

XIV. Adjournment

Town of Montreat
Board of Commissioners - Public Forum
April 9, 2026, 5:30 p.m.
Meeting Minutes

Board of Commissioners in Attendance:
Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Jane Alexander
Commissioner Mason Blake
Commissioner Tom Widmer
Commissioner Grant Dasher (arrived at 5:33 p.m)

Board of Commissioners Absent:
None

Town Staff in Attendance:
Savannah Parrish, Town Manager
Angie Murphy, Town Clerk
Brandon Freeman, Town Attorney
Marty Benson, Attorney
Interim Chief Tim Bradley

Members of the Public in Attendance:
Approximately 15 people

Call To Order

Mayor Tim Helms called the Public Forum to order at 5:30 PM, opening with a moment of silence. He welcomed the community members and explained that the public forum provides an opportunity for citizens to ask questions or make statements to the commissioners.

Agenda Adoption

Motion: Commissioner Alexander moved to adopt the agenda for the public forum. Commissioner Blake seconded. Motion carried unanimously.

Public Comments

Tom Frist of 98 Frist Road inquired about the town's policy regarding ice cream trucks and food trucks operating in Montreat. Town Manager Savannah Parrish explained that policies vary greatly depending on context, such as whether it's for a special event with permits or permanent operations. She noted there is a process and offered to review specific scenarios in the zoning ordinance.

Philip Arnold of 530 Magill Drive asked about FEMA operations during the government shutdown and its impact on town reimbursements. Ms. Parrish confirmed that portions of FEMA, including the public assistance branch they work with, have been furloughed for approximately two months. However, the town received $114,000 in reimbursement during this period because those funds had already moved through federal stages and were with the state awaiting payment. She explained that FEMA releases lump sums to states, which then distribute approved reimbursements to municipalities, with North Carolina Department of Treasury actually sending the checks.

Commissioner Tom Widmer sought clarification on the state's role, confirming they serve as a financial fiduciary without making approvals or decisions, though they can assist with appeals if FEMA denies projects.

Mayor Helms then invited discussion of the new solid waste ordinance, effective October 1st. Ms. Parrish opened the floor for questions about the sanitation ordinance requirements, stating it was probably on many people's minds since they just passed it. She reiterated that it would be in effect on October 1st and mentioned that they had some Q&A's posted on their website, accessible through a link in the Montreat Minute, for those who wanted more detailed information.

Philip Arnold of 530 Magill Drive asked about the number of properties needing bear-resistant containers. Ms. Parrish acknowledged they don't have specific figures but are aware that many homes have good functional systems already in place. However, she pointed out that there are also many systems that don't work well and will need to be either modified or replaced to meet the new ordinance requirements. She assured residents that if they have questions about their specific systems, the town is happy to come out, inspect, and provide feedback on whether their current systems would be sufficient under the new ordinance.

Commissioner Widmer added that for any sanitation-related questions, residents now have a dedicated email address—trash@townofmontreat.org. This new channel allows citizens to conveniently direct their inquiries and receive assistance pertaining to the recently passed solid waste ordinance, which takes effect on October 1st. The announcement prompted some lightheartedness as

Mayor Pro Tem Fouche amusingly commented on how the email's name could pertain to a wide range of topics, drawing chuckles from the participants. Town Manager Savannah Parrish took the opportunity to reiterate the town's dedication to facilitating a smooth transition to the new ordinance, ensuring that community members receive the necessary guidance for compliance. Parrish urged residents to actively reach out with any concerns or questions they might have regarding the requirements and compliance of their current waste management systems under the new ordinance. This proactive approach emphasizes the town's commitment to maintaining open communication with its residents, addressing potential issues before they arise.

Adjournment

Motion: Mayor Pro Tem Kitty Fouche moved to adjourn until 6:00 PM for the regular meeting. Commissioner Tom Widmer seconded. Motion carried unanimously.

_____ _____

Tim Helms, Mayor Angie Murphy, Town Clerk

Town of Montreat
Board of Commissioners-Town Council Meeting
April 9, 2026
Meeting Minutes

Board of Commissioners in Attendance:
Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Jane Alexander
Commissioner Mason Blake
Commissioner Tom Widmer
Commissioner Grant Dasher

Board of Commissioners Absent:
None

Town Staff in Attendance:
Savannah Parrish, Town Manager
Brandon Freeman, Town Attorney
Angie Murphy, Town Clerk
Rachel Eddings, Finance Officer
Tim Bradley, Interim Captain – Montreat Police
Marty Benson, Attorney
Barry Creasman, Public Works Director
Elijah Ammons – Patrol Officer

Members of the Public in Attendance:
Approximately 15 people

Call To Order

Mayor Tim Helms called the regular meeting to order at 6:00 PM with the Pledge of Allegiance, followed by a moment of silence.

Agenda Adoption

Town Manager Savannah Parrish noted the addition of budget amendments 13 and 14 as well as item d under new business.

Motion: Commissioner Tom Widmer moved to adopt the agenda with suggested changes. Commissioner Jane Alexander seconded. Motion carried unanimously.

Mayor's Communications

Mayor Helms reminded everyone about Landcare Day on Saturday from 10 AM to 2 PM at Moore Field, featuring vendors with plants, produce, fresh strawberries, local artists, and activities including a treasured tree walk and spring tea party seatings.

Town Manager's Communications and Consent Agenda

Ms. Parrish presented the consent agenda containing March 12th public forum and regular meeting minutes, plus March 13th special meeting minutes.

She announced several updates: Shelly Johnston was hired as the new part-time zoning administrator (Tuesdays, Wednesdays, Thursdays) as a town employee rather than through Land of Sky Regional Council. The police chief search continues with interviews ongoing and plans for second-round interviews.

Ms. Parrish reminded commissioners of the budget workshop scheduled for 9 AM the following morning to review public works and police budgets. She also addressed a procedural error regarding the sign ordinance, which was meant to be continued to the March meeting but was mistakenly thought to be continued to April. The ordinance will be dropped, re-advertised, and scheduled for June consideration after a workshop between town council and the sign subcommittee.

Regarding the May meeting, several commissioners indicated they would be unavailable, prompting Ms. Parrish to suggest polling for a special meeting to conduct necessary business and hold a public comment period.

Administrative Reports

Mayor Helms noted the administrative reports from various departments were included in the packet without questions from commissioners.

Public Comments

Kathy Putnam, chairman of the Landcare Festival and Arbor Day celebration, thanked the town and council for their support in promoting the festival. She reported a 1% chance of rain with a high of 76 degrees, highlighting plant and produce sellers, local artists, the treasured tree walk with Martha Campbell and Jason Nanz at 10:10 AM, and Betty Douglas's and Beth Frith's Spring Tea Party with seatings at 11 AM, noon, and 1 PM.

Tanner Pickett from Mountain Retreat Association thanked staff and council for their ongoing work. He announced an open house for the new retail area in the former Ten Thousand Villages space during the Arbor Day celebration, with a grand opening scheduled for May 23rd. He also promoted community hikes every Tuesday this month at 9 AM, with details and sign-ups available on their website, including a birding hike. Mr. Pickett mentioned that information about their new lodge plans would soon be available on their website following earlier announcements.

Old Business

Conditional Zoning Request - 779 Foreman Siding Road (Public Hearing)

Town Manager Parrish provided an overview of the conditional zoning request submitted by Wade and Susie Burns to rezone from R3 low density residential to R3 conditional zoning. The request seeks modifications to dimensional standards, specifically reduced front and side setbacks for a 0.26-acre property in the town's ETJ. She noted concerns raised by adjacent property owners regarding stream channel traversal and stormwater flow impacts.

> *Motion: Commissioner Jane Alexander moved to open the public hearing. Commissioner Grant Dasher seconded. Motion carried unanimously.*

Applicant Presentation:

Attorney TC Morphis represented the Burns family at the meeting and opted to defer his initial comments, allowing Wade Burns to present current site photos. He noted the extensive documentation they had previously provided. Wade Burns explained the involvement of a 26-foot section of open stream on their property. Specifically, he described the configuration consisting of a 4-foot pipe entering a channel, transitioning to a 3-foot pipe exiting, and then a 16-inch pipe, all with visible asphalt and concrete under their screened porch. Mr. Burns emphasized the basin design, which he considered "incredibly fortunately designed." This design included a concrete bulkhead and a boulder at the driveway bottom, creating a system that effectively "taps the brakes on the force of the water." According to Mr. Burns, the solution favored by his neighbor, Jim Hamilton, involved connecting all the pipes, which he believed would result in a "4-foot diameter fire hose nozzle aimed at the bank of Mr. Hamilton's stream" during extreme weather events, potentially causing significant issues.

Mr. Burns also addressed the variance request they submitted, which involved a 2-foot chimney setback and a variance for the front porch. He explained that implementing both the requested 30-foot stream setback and the necessary 80-foot septic setback would result in the entire lot becoming unbuildable. He referred to this scenario as an "indefensible piece of math," illustrating the complexities and challenges involved in meeting these requirements.

Furthermore, Mr. Morphis made a specific request related to the conditional zoning reconsideration. He suggested that if the conditional zoning were granted, the Burns family should be permitted to relocate the 4-inch pipes that drain the stormwater system. The aim of this relocation would be to avoid directing the pipes toward the Hamilton property. Mr. Morphis clarified that, under such circumstances, only a zoning permit would be required for the relocation of the pipes, framing it as a permissive condition.

Opposition Presentation:

Will Hamilton, representing his parents Jim and Christina Hamilton, outlined their continued opposition to the conditional zoning request. He presented site plans showing built-upon areas (roof, gravel driveway, paved driveway) with storm water being "collected and intentionally diverted onto our property" through three release points, which he characterized as "illegal trespass."

Mr. Hamilton described failed settlement discussions where Mr. Burns offered to pipe roof water to the back of the property but refused to remove other trespasses. When declined, Mr. Hamilton alleged Mr. Burns threatened to block their access through property owned by Wade and Francis (Crozier), showing survey documents indicating this threat.

Commissioner Widmer questioned how Mr. Burns could control access on property he doesn't own. Mr. Morphis responded that both the town and Mr. Burns have easements from Wade and Francis Crozier, while the Hamiltons have never obtained lawful access easement, characterizing this as pointing out legal realities rather than making threats.

Mr. Hamilton continued his environmental concerns, showing the 26 feet of stream on Burns' property "encircled on all sides with built upon areas," violating the stormwater ordinance's 30-foot setback requirement. While acknowledging Burns' measures prevented washout and protected his house during Hurricane Helene, Mr. Hamilton argued they don't prevent polluted storm water from entering the stream.

He detailed specific violations: porch roof draining directly into the stream (acknowledged by Burns as intentional), curbing designed to divert storm water down the paved driveway to empty onto Hamilton property, and drains collecting polluted storm water from gravel driveways above both properties.

Expert Testimony:

Civil engineer Wyatt Edsel testified that connecting the culvert systems would be feasible if done through junction boxes with adequate downstream pipe capacity. He noted the upstream 48-inch diameter pipe connects to downstream 36-inch and 16-inch pipes, creating some constriction, but had not performed hydraulic analysis.

Commissioner Mason Blake questioned how covering the stream would mitigate the volume issue. Mr. Edsel explained the intention was preventing impervious surface runoff from entering the stream directly, as the stormwater ordinance requires 30-foot vegetated buffers. Mr. Hamilton added they wouldn't oppose enlarging pipes on their property to make the system work.

Legal Arguments:

Mr. Hamilton presented legal concerns, referencing the New Bern LLC vs. First Berkshire Properties case recognizing it's unlawful for private parties to "intentionally and unreasonably divert and deposit storm water onto another private party's property." He argued the town council lacks authority to authorize perpetual trespass through conditional zoning and suggested approval could constitute illegal spot zoning since it only benefits Mr. Burns while harming neighbors and the community.

Mr. Hamilton noted discrepancies between Mr. Burns' submitted site plan (showing driveway "canted to divert SW from neighbor") and actual construction that directs water toward gaps on Hamilton property, evidenced by Easter rainfall video.

Mr. Morphis countered the spot zoning argument, citing his experience litigating such cases and referencing UC v. Town of Shallotte, where the North Carolina Court of Appeals held that spot zoning requires "a small tract of land owned by a single person." Since the property is owned by

Wade and Susie Burns (two people), it cannot legally constitute spot zoning under North Carolina law.

Regarding trespass claims, Mr. Morphis cited North Carolina law stating "each possessor is legally privileged to make a reasonable use of his land even though the flow of surface water is altered thereby and causes some harm to others," with liability only when interference is unreasonable and causes substantial damage.

Failed Compromise Efforts:

Commissioner Widmer referenced the January agreement for experts to seek compromise solutions. Mr. Hamilton explained that both experts participated in a call but never reached the discussion stage because fundamental disagreements prevented expert consultation. Mr. Hamilton maintained their position against continued trespass, while Mr. Morphis indicated Mr. Hamilton hired his expert specifically to validate their proposal rather than seek genuine compromise.

Technical Clarifications:

Commissioner Blake questioned the conditional zoning ordinance structure and requirements. As a member of the committee that developed the ordinance, he explained conditional zoning serves as an alternative to variances, particularly valuable in Montreat where no two lots are identical.

Commissioner Blake identified critical procedural deficiencies: the application lacks required exhibit map/schematic plan and written conditions necessary for conditional zoning approval. He noted the submitted map doesn't comply with code requirements (missing north arrow, date, acreage) and emphasized that conditional zoning requires recorded ordinances with specific conditions to be binding in perpetuity.

Commissioner Blake outlined essential loose ends requiring resolution: ensuring maintenance agreements for stormwater systems, addressing swales on adjacent property not covered by easements, confirming permissions for improvements in rights-of-way, and establishing repair/replacement responsibilities.

Most significantly, Commissioner Blake noted the current site plan shows no driveway improvements, but driveways exist on the property. Approving conditional zoning based on the submitted plan would create immediate ordinance violations, potentially generating automatic lawsuit grounds.

Commissioner Blake explained the backwards nature of this application: typically, applicants propose improvements with conditions before construction, but Mr. Burns built first and now seeks approval after the fact. Without conditions in a recorded ordinance, the improvements aren't legally binding.

Stormwater Ordinance Interaction:

Commissioner Blake expressed concern that conditional zoning cannot resolve the separate stormwater buffer requirement dispute currently in litigation. He believed the 30-foot setback issue must be resolved through proper variance procedures or court decisions, not through conditional zoning approval.

Town Attorney Brandon Freeman explained the distinction between quasi-judicial variance processes and legislative conditional zoning decisions, noting both can alter strict zoning rule applications but through different legal mechanisms. He acknowledged the complexity of interactions between the current court appeal and conditional zoning considerations.

Procedural Resolution:

After extensive discussion, Commissioner Blake proposed continuing the hearing to allow staff to prepare proper ordinance documentation with specific conditions, exhibit maps, and resolution of identified technical issues. He emphasized the need to avoid rushing decisions that could create legal vulnerabilities for the town.

Mr. Burns provided clarifications about MRA permissions for right-of-way improvements and sewer easements addressing some technical concerns.

Mr. Morphis requested board direction on approval inclination before determining whether to proceed with ordinance preparation or resubmission. He suggested conditions could address the paved driveway issue through either map corrections or specific authorization conditions.

Mayor Pro Tem Kitty Fouche expressed strong reservations about the driveway, noting she observed paving occurring on the day of the originally scheduled vote during snowy conditions, characterizing it as a "sneaky move." Commissioner Widmer shared similar concerns about the rushed paving timing.

> *Motion: Commissioner Mason Blake moved to continue the public hearing to a date certain. Mayor Pro Tem Kitty Fouche seconded. Motion carried unanimously.*

The public hearing was continued to the July 9, 2026, regular meeting to allow staff and the town attorney to prepare proper ordinance documentation with specific conditions addressing the technical and legal requirements identified during the discussion.

New Business

Ordinance Authorizing Limited Use of Golf Carts

Town Manager Parrish explained that the MRA and Presbyterian Association of Musicians requested limited golf cart use for the 2026 Worship and Music Conference, similar to the successful 2025 arrangement. She reported no issues occurred during last year's conference, with police successfully managing traffic flow.

Mayor Helms confirmed he observed no problems during last year's event while at the Nature Center. Commissioner Jane Alexander verified the conference ends on July 3rd, ensuring no golf cart use on July 4th.

> *Motion: Commissioner Mason Blake moved to approve the ordinance as presented. Commissioner Grant Dasher seconded. Motion carried unanimously.*

Resolution Authorizing Joint Cooperation Agreement Amendment

Town Manager Parrish presented a resolution to add the towns of Mars Hill and Marshall to the Asheville Regional Housing Consortium. She explained this housekeeping item requires all

current consortium members to vote on new member additions, though it doesn't significantly *impact Montreat's participation.*

> *Motion: Mayor Pro Tem Fouche moved to approve the resolution. Commissioner Widmer seconded. Motion carried unanimously.*

Budget Amendments 13 and 14

Town Manager Parrish presented budget amendment 13 to move funds from streets department capital outlay to sanitation capital outlay for convenience center gate upgrades, as discussed in the previous budget meeting. The commissioners had instructed staff to find funding within the current fiscal year for these improvements.

The Town Manager presented budget amendments for consideration. Budget Amendment Number 13 was proposed to address improvements as soon as possible. Budget Amendment Number 14 would include the most recent FEMA disbursement of $114,340.27 into Fund 29. Additionally, an amendment to the original pre-audited amount from $132,654 to $246,994 for Withers Ravenel Culver Engineering was proposed to cover more portions of the contract to be completed in this fiscal year.

Mayor Helms inquired if there were any questions about the budget amendments from the town manager and indicated both amendments could be considered in one motion.

> *Motion: Commissioner Tom Widmer moved to approve both budget amendments numbered 13 and 14. Commissioner Jane Alexander seconded the motion. The motion passed unanimously.*

Mayor Helms opened the floor for public comment. Tom Frist of 98 Frist Road addressed the commission, expressing his concern about ongoing conflicts in the community involving the Burns and Hamilton families, whom he described as stalwarts of Montreat. He noted the pain these conflicts cause, comparing them to previous divided issues like the town hall matter and church split. Mr. Frist emphasized that as friends and Christians, these seem like small issues compared to world events and suggested a potential solution where if Mr. Burns believes his system will work, he should guarantee to fix any damage done to the Hamilton's property or to Montreat. He thanked Commissioner Blake for his study and efforts, noting the complexity of what should be a simple matter, and expressed hope that goodwill could lead to a resolution.

Mayor Helms thanked Tom for his comments and suggested it might be a conversation to have with other people involved. The mayor noted they had been hoping for such resolution as well, but acknowledged the issue persists.

Commissioner Grant Dasher left the meeting at 7:59 p.m.

Closed Session to Consult with the Town Attorney

Town Attorney Brandon Freeman provided clarification on the proper legal citation and purpose for the closed session. He explained that the closed session would be pursuant to N.C.G.S. § 143-318.11(a)(3) to discuss a legal matter to preserve attorney-client privilege, specifically regarding ongoing litigation pending in Buncombe County between MRA versus Town of Montreat and others, which is also pending in the Court of Appeals.

Motion: Mayor Pro Tem Kitty Fouche moved to enter into closed session as authorized by § 143-318.11(a)(3). *Commissioner Tom Widmer seconded the motion. The motion passed unanimously.*

Closed Session participants moved to the Conference Room.

Motion: A motion was made to return to Open Session at 8:30 p.m. by Commissioner Tom Widmer. Mayor Pro Tem Kitty Fouche seconded the motion. The motion passed unanimously.

Upon returning to Open Session there was no official business to discuss.

Motion: A motion was made by Commissioner Tom Widmer to adjourn the meeting at 8:32 p.m. Commissioner Jane Alexander seconded the motion. The motion passed unanimously and the meeting was adjourned.

Tim Helms, Mayor

Angie Murphy, Town Council

Town of Montreat
Board of Commissioners -Budget Workshop #2
April 10, 2026, 9:00 a.m.
Meeting Minutes

Board of Commissioners in Attendance:
Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Jane Alexander
Commissioner Mason Blake
Commissioner Tom Widmer
Commissioner Grant Dasher (arrived at approx. 9:10 a.m.)

Board of Commissioners Absent:
None

Town Staff in Attendance:
Savannah Parrish, Town Manager
Barry Creasman, Public Works Director
Tim Bradley, Interim Police Chief
Justyn Whitson, Patrol Officer

Members of the Public in Attendance:
None

Mayor Tim Helms called the Budget Workshop #2 to order at 9:00 AM on Friday, April 10, 2026, at Montreat Town Hall.

Budget Workshop

Town Manager Savannah Parrish opened the budget workshop by announcing the meeting would focus on public works department budgets not previously covered and include a high-level overview of the police department budget. She emphasized the goal of keeping the session close to one hour.

Property Tax Revaluation Discussion

The meeting began with discussion about the recent property revaluation and its impact on tax rates. Town Manager Savannah Parrish explained that most municipalities are not planning to go revenue neutral with the new property values, instead keeping tax rates at current levels, which would effectively increase taxes for property owners. Commissioner Tom Widmer noted that keeping rates unchanged rather than reducing them would essentially double the tax burden on residents given the significant increase in property values.

Commissioner Mason Blake suggested considering partial rollbacks and emphasized the importance of ensuring the water department remains self-sustaining as an enterprise fund

without subsidization from the general fund. Mayor Helms reminded the board that they had previously discussed the possibility of raising tax rates temporarily to address infrastructure needs following Hurricane Helene.

State Revolving Fund Award

Town Manager Savannah Parrish announced excellent news during the meeting: the state is recommending Montreat receive the full $4,000,800 grant for water infrastructure improvements through the State Revolving Fund program. This award will allow the town to harden water infrastructure without requiring local matching funds.

Public Works Budget Presentation

Public Works Director Barry Creasman presented the department's budget requests, explaining that most line items stayed as close to current levels as possible. However, significant increases were requested for equipment repairs and truck maintenance due to the aging fleet and increased wear from Hurricane Helene recovery operations.

Recreation Department Budget

The recreation budget of approximately $25,000 primarily covers tree maintenance contracts. Mr. Creasman noted that vendor relationships have changed, requiring new contractors at higher rates, resulting in slight increases for specialized tree work beyond the department's capabilities.

Water Department Budget

The water department budget shows substantial increases in two main areas: well repairs and truck maintenance. Mr. Creasman explained that well motors are aging and requiring upgrades, while the water department truck has experienced significant wear from serving multiple purposes including snow plowing and off-road use during Hurricane Helene. The truck has over 100,000 miles and needs transmission and rear-end repairs.

Mr. Creasman noted that if the State Revolving Fund award is received, some well repair costs and capital improvements may be reduced. The grant would cover valve maintenance, cleaning valve boxes, and other infrastructure improvements totaling $112,000.

Commissioner Widmer questioned a 32% budget decrease, which was explained by the completion of a $120,000 water read system project from the previous year that will not continue. Town Manager Savannah Parrish emphasized the need to make the water fund self-sustaining as required by the state, which may necessitate water rate adjustments.

Public Works Operations Budget

The public works operating budget remains relatively stable with minor increases for equipment repairs and chainsaw replacements. Mr. Creasman noted increased tree maintenance needs as delayed effects from Hurricane Helene continue to manifest with damaged and weakened trees.

Streets Department Budget

The streets budget shows a significant increase from approximately $312,000 to $671,000, primarily due to major paving projects. Two large projects are planned: Lower Lookout Road paving from Appalachian to Assembly Drive ($132,366) and Overbrook Road improvements. Mr. Creasman clarified that Lower Lookout Road work is separate from FEMA-funded Upper Lookout Road repairs, representing a return to regular maintenance scheduling.

The Lower Lookout project includes milling, paving, sidewalk replacement, and curb work. Mr. Creasman noted that existing drainage infrastructure is in good condition and won't require replacement. Overbrook Road will receive new stone, compaction, and paving as the annual gravel road improvement project.

Commissioner Widmer asked about West Virginia Avenue, which Mr. Creasman indicated would appear in year four of the long-term planning schedule, with Arkansas Road and part of Chapman Road planned for years two and three.

Fleet Replacement Challenges

Both Public Works Director Creasman and Town Manager Parrish emphasized the critical need for fleet replacement across all departments. Years of deferred maintenance have created a crisis where the town must balance expensive repairs against purchasing new vehicles. Mr. Creasman expressed concern about the department's ability to maintain service levels if another major weather event occurs, given the current state of the fleet.

The discussion highlighted the town's shift in budget priorities from focusing on employee compensation in recent years to now addressing aging infrastructure and equipment. Town Manager Savannah Parrish noted that equipment and vehicle costs will never be lower than current prices, making immediate action preferable to continued delays.

Police Department Budget Presentation

Interim Chief Tim Bradley opened the police presentation by thanking Town Manager Savannah Parrish for her leadership during Hurricane Helene and recognizing board members' community service during the crisis. He announced the appointment of Justyn Whitson as Interim Captain, citing his decade of experience with the department and commitment to professional development.

Personnel Services and Career Ladder

Interim Captain Whitson explained the department's request to promote one full-time officer position to full-time captain, enhancing succession planning and ensuring continuity of operations. The department proposes implementing a comprehensive career ladder system with Police Officer I, Police Officer II, and Master Police Officer levels based on years of service and training completion.

The career ladder would provide advancement opportunities within the small agency, requiring dedication to ongoing professional development rather than simple testing. The system aims to improve both recruitment and retention by giving officers a clear path for growth while maintaining patrol responsibilities.

Equipment and Technology Needs

The police department requested funding for tablets/iPads with internet connectivity to digitize paperwork and improve field operations. Interim Captain Whitson explained these devices would integrate with county dispatch systems, provide GPS tracking for officer safety, and allow real-time access to criminal history and warrant information.

The department seeks increased training budget from $600 to $2,500, noting the current amount covers only one training week for one officer annually. The increase would allow officers to attend specialized training outside the jurisdiction and receive proper certifications. Interim Chief Bradley emphasized the department's recent success in closing all reported cases and receiving recognition from the district attorney's office for increased professionalism.

Vehicle Fleet Crisis

The police vehicle fleet faces critical challenges with vehicles ranging from 2013 to 2021 model years. The department currently operates a 2013 chief's vehicle, a 2015 patrol car, two 2017 models (one donated after Hurricane Helene with 128,000 miles), and a 2021 Dodge in relatively good condition.

One 2017 vehicle is essentially inoperable and requires expensive repairs that may not be cost-effective. The department has FEMA funding available to purchase one vehicle this budget year and requests approval for a second vehicle purchase.

The department is considering Toyota Tacomas as more suitable for Montreat's terrain and needs, offering better longevity and off-road capabilities than traditional police package vehicles while being more cost-effective at approximately $41,500 before upfitting.

Take-Home Vehicle Program

A significant budget increase in auto supplies reflects the proposed take-home vehicle program, estimated at $1,700 per officer annually. Interim Captain Whitson explained this program would improve recruitment and retention, as surrounding agencies offer similar benefits. The program would also increase vehicle accountability, with officers maintaining their assigned vehicles and reporting maintenance needs promptly.

Both police leaders emphasized that officers expressed preference for take-home vehicles over salary increases, understanding the program represents a form of compensation through reduced personal vehicle use. The policy would include mileage limitations and restrict use to official business only.

Technology and Equipment Updates

The department requests funding for body-worn cameras ($3,500 over four years), new mobile radios for vehicles without them ($6,000 each), and software subscriptions including the Freedom app for accessing county dispatch information and Notability for digital forms.

Interim Chief Bradley demonstrated how tablets would eliminate paper forms, allow digital signatures for Miranda warnings and consent forms, and provide immediate access to criminal databases. This technology integration aims to increase efficiency while maintaining evidence integrity through digital storage.

Public Safety Education Programs

The department maintains funding for community engagement through Coffee with a Cop events, Safety Saturdays, and National Night Out participation. These programs build community relationships and provide recruitment opportunities while promoting positive police-community interactions.

Meeting Conclusion/Adjournment

Town Manager Savannah Parrish indicated the next budget meeting would include tax rate information and revenue neutral calculations, with actual budget workbooks provided to commissioners. She noted the need for two additional meetings before presenting the recommended budget by June 1st.

Mayor Helms expressed appreciation for staff professionalism and community service, with commissioners echoing gratitude for leadership during Hurricane Helene recovery. The board

recognized the significant budget challenges ahead while acknowledging the critical need for infrastructure and fleet investments.

Motion: Mayor Pro Tem Kitty Fouche moved to adjourn the meeting. Commissioner Mason Blake seconded the motion. The motion passed unanimously.

_____ _____

Tim Helms, Mayor Angie Murphy, Town Clerk

Board of Commissioners & Sign Ordinance Subcommittee Joint Workshop

May 1, 2026
Meeting Minutes

Board of Commissioners in Attendance
Mayor Tim Helms
Commissioner Tom Widmer
Commissioner Jane Alexander
Commissioner Mason Blake (via Zoom at 10:11 a.m.)

Sign Ordinance Subcommittee Members in Attendance
Gayle Sawyer, Chair
Clay Hamilton, Member

Town Staff in Attendance
Angie Murphy, Town Clerk
Shelly Johnston, Zoning Administrator

Members of the Public in Attendance
1 person in attendance (Tanner Pickett, MRA)

Call to Order

Mayor Tim Helms called the Board of Commissioners & Sign Ordinance Subcommittee Joint Workshop to order at 10:00 AM on Friday, May 1, 2026. Mayor Helms noted that a quorum was not present, with two commissioners in attendance and others expected to join via Zoom.

Present: Mayor Tim Helms; Commissioner Jane Alexander; Commissioner Tom Widmer (in person); Commissioner Mason Blake (via Zoom)

Absent: Quorum not established; remaining commissioners not present.

Agenda Adoption

A quorum was not present therefore the agenda was not officially adopted.

Review and Discussion of Draft Sign Ordinance

Mayor Helms opened the workshop by noting its purpose was a working review of the draft sign ordinance, not a formal action meeting. He noted that Commissioner Mason Blake, who had done significant research and preparation, would be joining via Zoom. The group agreed to proceed section by section through the draft document.

Section 201 – Definitions

Honorarium Sign Definition

Gayle Sawyer, Chair, of the Planning & Zoning Commission noted that, following a prior workshop with Commissioner Blake, several changes had been incorporated into the draft in blue text, including the restoration of an honorarium sign definition and revisions to the ground-mounted sign definition. The current definition described an honorarium sign as "a plaque or small sign located so as to provide recognition of a donor for contributions given toward capital projects or specific improvements to existing facilities."

Zoning Administrator Shelly Johnston raised concern that the definition was too narrow, noting that limiting honorarium signs to capital projects or improvements would exclude other common memorial or recognition uses. She offered to research how other municipalities define such signs and to propose revised language.

Commissioner Blake, participating via Zoom, advised that the better legal approach was to remove honorarium signs from the definition of "sign" entirely, rather than attempting to regulate them as a category of sign. He explained that any category defined by its content—including "honorarium signs"—would be struck down as an unconstitutional content-based regulation under prevailing Supreme Court precedent. Commissioner Blake proposed inserting language at the end of the definition of "sign" specifying that the term does not include markings or indications placed on surfaces which recognize a donor contributing to a nonprofit organization or which honor the memory of someone designated by a donor. He also recommended that Section 805.25 (Honorarium Signs), which had previously been deleted and was being considered for reinstatement, remain deleted.

Clay Hamilton raised a concern that removing the definition and associated regulations could permit large or inappropriate honorarium installations without any size or style restrictions. Commissioner Blake acknowledged this was "the price you pay for compliance" with the Supreme Court ruling but noted that no objectionable honorarium signs had appeared in Montreat to date. He further clarified that because honorarium signs would no longer be classified as "signs," the enforcement and permitting sections of the ordinance would not apply to them.

Tanner Pickett, representing MRA, raised a practical concern that items not addressed in the ordinance are sometimes interpreted by staff as not being permitted. Commissioner Blake responded that Section 801, which applies regulations to all signs in all zoning districts, would implicitly clarify that if something is not a sign, it is not subject to those regulations.

The group reached consensus to: (1) delete the definition of "honorarium sign" from Section 201; (2) delete Section 805.25 in its entirety; and (3) insert new language into the definition of "sign" to exclude honorarium-type recognition markers.

Temporary Sign Definition

Commissioner Blake proposed returning to the prior version of the temporary sign definition, which read: "a sign with or without a structural frame, (1) not permanently attached to a building, structure, or the ground, and (2) intended for a limited period of time." He

expressed concern that the current draft definition—describing a temporary sign simply as one "not permanently attached to the ground"—was insufficient. He agreed to transmit his proposed language to the Zoning Administrator Shelly Johnston for review.

Wall Sign and Window Sign Definitions

Commissioner Blake noted minor proposed changes: the wall sign definition should be broadened to include "or other exterior walls such as a retaining wall," and the window sign definition should be clarified to include signs "printed or painted on the interior or exterior of a window or door of a building." These changes were noted for incorporation.

Wayfinding Sign Definition

Commissioner Blake recommended adding a formal definition of "wayfinding sign" to the definitions section, separate from the existing definition of "wayfinding." He proposed the following definition: "a sign designed and intended to direct a person from point to point or confirming a person's location or progress along a route." He noted that wayfinding signs are generally not considered content-based under current court interpretations and are particularly important in Montreat given its extensive trail network on both public and private property. The group noted that a definition was already present on page 12 of the draft, though not specifically as a distinctly defined sign type.

Article 8 – Signage Regulations

Section 801 – General Provisions / Enforcement (Sections 801.2, 801.8, and 801.9)

Commissioner Widmer noted that Section 801.8 referenced Section 801.9 that no longer existed in the draft, as the prior subcommittee had removed the specialized sign enforcement provisions and substituted references to general zoning enforcement sections 305, 306, and 307.

Commissioner Blake expressed serious concern about this change. He argued that the original Section 801.9 contained enforcement remedies—such as the requirement to remove non-compliant signs upon notice—that were specifically tailored to sign violations and were not replicated in the general zoning enforcement sections. He stated that the substituted references to Sections 305, 306, and 307 were not appropriate for sign enforcement as currently written, and that either the specialized sign enforcement provisions needed to be restored, or the general zoning sections needed to be revised to include sign-specific remedies.

Gayle Sawyer noted that at the prior workshop, there had been a discussion about potentially broadening Sections 305, 306, and 307 to cover sign enforcement. Commissioner Blake acknowledged either approach could work, so long as the resulting language provided comprehensive penalties and remedies appropriate to signs.

The group agreed that Zoning Administrator Johnston and Commissioner Blake would collaborate to resolve this issue, including addressing the renumbering of references in Sections 801.2 and 801.8.

Section 801.5 – Sign Setback Requirements

Commissioner Blake requested that the phrase "or temporary sign" be added alongside "ground mounted sign" within Section 801.5 to ensure temporary signs are also subject to setback requirements.

Section 802.2 – Signs in the Right-of-Way

Commissioner Widmer noted that Section 802.2, which prohibits signs in the street right-of-way, appeared to conflict with a project already underway by the Presbyterian Heritage Center (PHC). He stated that PHC had been authorized by Town Manager Savannah Parrish to proceed with the design of signs to be placed in the right-of-way and that the section, as written, would prohibit those signs. He suggested adding qualifying language such as "unless otherwise approved by the Town Council."

Commissioner Blake concurred and noted that consistency would also need to be maintained with the temporary signs provisions. The group agreed this needed further coordination between Commissioner Blake and the Zoning Administrator.

Section 802.5 – Flashing Devices

Commissioner Widmer raised whether the prohibition on flashing signs would prohibit flashing caution lights used by private contractors working in the roadway. Gayle Sawyer pointed to Section 803.3 (warning signs) as the applicable provision. Commissioner Blake suggested adding the word "flashing" to the language in Section 803.3, which currently permits governmental agency signs to be illuminated, so that warning signs erected by private parties could also explicitly be flashing. This addition was agreed upon.

Section 803.1 – Governmental Agency Signs

Commissioner Blake noted that several sign types that might otherwise be considered content-based—including educational signs, informational signs, and directional signs in the right-of-way—were being placed under the governmental agency signs exemption. He expressed concern that references to "informational signs" within this section could themselves be characterized as content-based. He suggested the section be revised to refer more broadly to "signs located on governmental property which are either erected by the town or permitted to be erected by the town," without categorizing signs by their content. He agreed to work with the Zoning Administrator on revised language.

Gayle Sawyer clarified that the key language from prior discussions was that signs be "erected by, or installed with the approval of, a governmental agency," including the town, county, or state, and that this framing was intended to cover the full range of sign types discussed.

Section 803.4 – Historical Engraved or Chiseled Wall Signs

Commissioner Widmer raised that the word "historical" in the section title constituted a content-based descriptor and should be removed in light of the Supreme Court ruling. Commissioner Blake concurred. It was further noted that all existing signs of this type would be grandfathered, as the ordinance does not operate retroactively.

Section 804.3 – Temporary Signs

Discussion identified potential conflicts between the temporary signs section and the right-of-way prohibition in Section 802.2. Commissioner Blake noted that many temporary signs are placed in the right-of-way and that the ordinance should include a mechanism—such as designated placement locations as existed under prior practice—for permitting such signs with appropriate town approval.

Clay Hamilton raised several practical concerns: (1) the variability of right-of-way boundaries in Montreat; (2) the need for owner permission before placing signs on private property; (3) the five-day post-event removal period, which may be appropriate for some

signs but not for permanent or ongoing displays; and (4) the need for clarity on when the period begins and ends for events with no defined end date.

Commissioner Blake suggested that the duration for temporary signs might be reduced from five days to three days, given that the prior two-day limit applied to a narrower category of special event signs. He also noted that references to "event signs" should be avoided as they are content-based.

Section 804.2 – Nameplate Signs

Commissioner Blake flagged that nameplate signs are a content-based sign category and cannot be regulated as such under the Supreme Court ruling. He proposed that this could be resolved by allowing one sign of a specified size on any residential lot regardless of its content—whether used as a nameplate, a non-residential identification, or otherwise. He suggested consulting Town Attorney Brandon Freeman for guidance and noted that the same logic applied to the non-residential use sign currently listed in Section 805.1.

Section 804.4 – Flags

No substantive concerns were raised in this section.

Section 805.24 – Banners (Institutional District)

Discussion arose regarding the 30-day permit period for banners in the institutional district. Tanner Pickett noted that Montreat Conference Center regularly hangs a banner outside Freeland Hall for the summer season, typically from early June through mid-August—a period of approximately 10 weeks—and has historically renewed the permit with the town annually. Commissioner Widmer noted that 30 days was insufficient for this use. A subcommittee member suggested aligning the banner permit period with the three-month limit used for utility pole banners. The group agreed to change the duration for Section 805.24 to 90 days.

Section 806 – Utility Pole Banners / Town Center Overlay District

Commissioner Widmer raised the longstanding request from Montreat College to install banners on light poles. Gayle Sawyer noted this was addressed under Section 806. Commissioner Blake suggested the section include introductory language clarifying that it applies to property within the Town Center Overlay District and that owners may install banners on utility poles located on or adjacent to their property.

Commissioner Widmer raised a concern about the current boundaries of the Town Center Overlay District, noting that it appeared to exclude certain properties such as Freeland Hall and portions of the assembly drive. Mayor Helms suggested that any boundary questions should be referred back to the Planning and Zoning Commission. Tanner Pickett noted that the overlay district boundaries may have originally been drawn at the college's request and may not have been intended to include all MRA properties. The Zoning Administrator suggested that the Planning and Zoning Commission review and provide direction on this matter.

Section 805.21–805.24 – Sign Sizes / Multi-Tenant and Corner Lots

Commissioner Blake expressed concern that the 16-square-foot maximum for multi-tenant signs was too small for institutional buildings with significant setbacks or multiple street frontages, noting that existing signs at the Freeland building and Montreat Center appeared to substantially exceed this limit. He noted that while existing signs would be grandfathered, replacement signs would be required to meet the smaller standard.

Commissioner Widmer agreed, noting that a 4-by-4-foot sign is not legible from a distance. A subcommittee member suggested that rather than specifying a fixed square footage, the ordinance could require a permit for any sign exceeding 16 square feet, with approval conditioned on the sign being in keeping with the scale, style, and character of the site. Commissioner Blake noted this would not provide relief under the current draft, as all signs in Section 805 require permits and the regulations are stated as binding. He recommended either deleting the size requirement or measuring existing appropriate signs and using those measurements as the standard.

Mayor Helms suggested leaving size determinations to the discretion of the Zoning Administrator, using appropriate scale relative to the building and setbacks. Clay Hamilton proposed including a standard such as "appropriate scale and character" to give the Zoning Administrator clear authority to make that determination.

On the matter of corner lots and double-frontage lots, Commissioner Blake recommended restoring the prior language allowing two signs facing each street—effectively allowing a total of four signs for a multi-tenant building on a corner or double-frontage lot in the institutional district.

Section 807 – Non-Conforming Signs

Commissioner Widmer raised a question about whether existing non-conforming signs were grandfathered. Gayle Sawyer confirmed that non-conforming signs may continue in use until they deteriorate, are destroyed, or are replaced, at which point they must be brought into compliance. She noted that language proposed by Interim Zoning Administrator Alexis Baker had been added to address signs that are not easily removable due to free speech considerations but should be removed when they become deteriorated or unsightly.

Section 809 – Wayfinding Signs

Clay Hamilton clarified that wayfinding signs had not been removed because they were considered content-based, but because they were believed to be covered under other sign categories. Commissioner Blake agreed that wayfinding signs needed to be permitted somewhere in the ordinance, particularly given their public safety importance for Montreat's trail network. The Zoning Administrator was asked to confirm that wayfinding signs are clearly addressed somewhere within the final document.

General Discussion on Enforcement and Administration

Zoning Administrator Shelly Johnston noted that it is common for municipalities to maintain both a sign ordinance and a separate zoning ordinance, and that the relationship between these two documents needed to be clearly defined. She stated a preference for straightforward, enforceable language and noted that a reference chart identifying sign types and applicable regulations would improve clarity for both staff and the public.

A discussion arose regarding enforcement responsibilities. Ms. Johnston noted that she is in the office only two days per week and would need assistance to monitor signs across the town. Commissioner Widmer suggested sharing enforcement responsibilities with the police department, with officers noting non-compliant signs during regular patrols. Ms. Johnston agreed this was a practical approach, provided that clear standards existed so that officers could act with certainty about what was and was not permitted.

The Zoning Administrator and subcommittee members noted that the ordinance, while comprehensive, contained references spread across multiple sections and in some cases was

duplicative with the zoning code. Johnston emphasized that consolidating sign regulations into a single location would improve both public understanding and administrative clarity.

In response to the volume of outstanding issues, Zoning Administrator Johnston advised that completing a finished draft by the June 11 council meeting was not realistic given the scope of remaining revisions and her availability. Mayor Helms agreed, stating: "Let's take our time and get it right." The group agreed to target a July council meeting for presentation of the revised ordinance. Ms. Johnston requested that future review be organized in smaller chunks, presenting revised sections for workshop review before assembling the complete document.

Public Comment

Mayor Helms opened the floor for public comment. No public comments were offered.

Adjournment

The meeting was adjourned at 12:16 p.m. by Mayor Helms.

_____ _____

Tim Helms, Mayor Angie Murphy, Town Clerk

Town of Montreat
Board of Commissioners - Budget Workshop #3
May 8, 2026, 9:00 a.m.
Meeting Minutes

Board of Commissioners in Attendance:
Mayor Tim Helms
Commissioner Tom Widmer
Commissioner Jane Alexander
Commissioner Mason Blake

Board of Commissioners Absent:
Mayor Pro Tem Kitty Fouche
Commissioner Grant Dasher

Town Staff in Attendance:
Town Manager Savannah Parrish
Town Clerk Angie Murphy
Public Works Director Barry Creasman
Finance Officer Rachel Eddings

Members of the Public in Attendance:
None

Call to Order

The meeting was called to order at 9:06 p.m. Mayor Helms led the assembly in a moment of silent reflection.

Agenda Adoption

Motion to adopt the agenda as presented was made by Commissioner Tom Widmer and seconded by Commissioner Jane Alexander. The motion carried unanimously.

Presentation of the Town Manager's Recommended Budget

Town Manager Savannah Parrish opened her presentation by addressing two significant areas of uncertainty before turning to the budget itself.

State Bill SB 889: Town Manager Parrish advised the Board that SB 889, a piece of state legislation that has passed the North Carolina Senate and is pending a House vote, has the potential to materially impact Buncombe County's 2026 property reappraisal. As proposed, counties that conducted a reappraisal effective January 1, 2026, would be required to temporarily revert to prior property values for tax purposes, effectively delaying the use of updated property values for the FY2027 budget cycle. While the bill would not limit the ability to adjust the tax rate, it creates significant uncertainty in revenue projections. Town Manager Parrish indicated that staff would continue monitoring the bill closely. Commissioner Widmer inquired about the timeline for a House vote; Town Manager Parrish responded that no movement had been observed that morning and that the short legislative session was expected to continue through the following week.

Proposed Tax Rate: Town Manager Parrish noted that the Board has not yet established a tax rate for FY2026–27, and accordingly, two separate budget scenarios were prepared for Council's consideration — one based on a tax rate of 43 cents per $100 of valuation and one based on a rate of 40 cents per $100 — both reflecting the updated property values from the county reappraisal. The presentation focused on the 43-cent scenario.

Budget Overview: The proposed FY2026–27 budget is a balanced budget totaling $3,223,918. Key components are as follows:

- The General Fund is balanced at $2,700,818 in both revenues and expenditures.
- The Water Fund is self-supporting, balanced at $523,100, and includes a proposed 5% increase in water rates.
- Staff would be eligible for an up to 3% merit-based increase, consistent with the two prior years.
- The Town would continue to cover 75% of family health insurance costs.
- Capital investments included in the budget encompass road paving projects, vehicle replacements, equipment upgrades, hydrant repairs, and a take-home vehicle program for the Police Department.
- Each penny of the 43-cent tax rate generates approximately $44,926 in revenue.

Town Manager Parrish noted that the Council will likely adjust the tax rate downward, and that the budget would be balanced in response to whatever rate is ultimately set.

Town Council Discussion

Tax Rate and Fiscal Burden

Commissioner Widmer opened the discussion by expressing his concern that maintaining the full 43-cent rate under the new reappraisal values would impose an undue burden on residents — amounting to approximately $1,000 per household, on top of anticipated increases at the county and fire district levels. He noted that the County has raised its tax rate every year for the past five years and argued that allowing the Town rate to remain at 43 cents under the new, higher valuations would send the wrong message to the community, regardless of actual spending necessity. He strongly advocated for a meaningful reduction from the current rate, noting that the revenue-neutral rate under the reappraisal is approximately 30 cents, leaving considerable room between 30 and 43 cents.

Mayor Helms acknowledged that at prior public meetings, including the Cottagers meeting, he had forewarned residents that a tax increase was likely this year, citing losses and capital needs stemming from prior storm damage and FEMA recovery efforts.

FEMA Recovery and Capital Needs

Town Manager Parrish clarified that FEMA-related expenditures are tracked separately in Fund 29 and are not reflected in the General Fund budget. The mayor asked Public Works Director Barry Creasman to speak to the urgency of the capital project requests. Mr. Creasman firmly stated that the equipment requests are necessities — not a wish list — and that several Town vehicles and pieces of equipment are at risk of catastrophic failure due to heavy use during storm recovery operations. He outlined upcoming FEMA-related work, including major culvert replacements on Lookout Road (citing Yale, Chapman, and two culverts on Lookout Road itself) that must be completed before paving can proceed on those corridors. He also described ongoing discussions with engineers and FEMA regarding permanent versus temporary repairs for multiple landslide sites.

Fire District Tax Rate

In response to a prior inquiry from Commissioner Widmer, Town Manager Parrish reported that she met with the interim town manager of Black Mountain and the fire chief regarding a potential direct contract for fire services. That avenue was determined to be unworkable, as the other party was not interested and indicated any rate savings would be passed back to the Town regardless. On

the broader fire district question, Town Manager Parrish explained that Buncombe County is consolidating all fire districts into a unified fire tax district, with the county manager proposing a rate of 11.73 cents per $100. While this is lower than initially feared, she noted that the East Buncombe Fire District currently carries one of the lower rates in the county and that the unified district rate should be expected to increase annually. She indicated that a county-wide fire department — eliminating the need for municipal fire contracts — is likely within five years.

Consensus on Direction

Commissioner Tom Widmer acknowledged the undeniable need for a significant increase, noting that the tax rate has been flat for five years despite ongoing inflation and capital deterioration. He and other commissioners expressed a shared desire to find a figure between the current revenue-neutral rate and 43 cents, suggesting looking at a midpoint as a possible benchmark. Commissioner Jane Alexander agreed that a meaningful increase is necessary but emphasized the importance of engaging the community to explain the needs driving it. The mayor echoed the sentiment, noting that the increase should not be borne on the backs of employees or taxpayers beyond what is truly necessary, but that the Town's accumulated needs — particularly for Public Works — require action.

Commissioner Widmer suggested that if the moratorium is enacted and the Town must increase rates based on prior valuations, a corresponding decrease the following year would be appropriate — effectively achieving the same fiscal outcome as a one-time assessment. He also suggested that tax bills could include communication directing residents' attention to their state legislators.

Next Steps

Town Manager Parrish proposed that staff compile and distribute a comprehensive email to all commissioners detailing the differences between the two budget scenarios, a per-penny tax revenue breakdown under both reappraisal and pre-reappraisal valuations, and projected tax rates needed to meet identified revenue targets. She noted that Finance staff (Rachel Eddings) had also begun preparing a third budget scenario in the event SB 889 passes. Commissioners were asked to provide feedback and preferred tax rate direction to staff no later than Tuesday, May 26, 2026, to allow adequate time to finalize the budget in advance of the June Town Council meeting, at which a public hearing and formal budget adoption are planned.

Public Comment

No members of the public were present to offer comment during the public comment period.

Adjournment

Motion to adjourn was made by Commissioner Jane Alexander and seconded by Commissioner Mason Blake. The motion carried unanimously. The meeting was adjourned at 11:03 a.m.

_____ _____

Mayor Tim Helms Town Clerk Angie Murphy

TOWN OF MONTREAT
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ADMINISTRATIVE REPORTS:
ADMINISTRATION

Town Administration report for the month of April 2026

Monthly Statistics	2025	2026
Public Meetings	6	7
Public Records Requests Processed	3	2
Water Bills Processed & Mailed	649	621
Water Bills Processed & Emailed	58	93
Leak Adjustments	6	1
Sunshine List Messages	13	16
Website Posts	13	16
Social Media Posts	13	16

Upcoming Events and Schedule Changes
0

Comments
N/A

Staff Communications
0

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ADMINISTRATIVE REPORTS:
STREETS

Streets Department report for the month of April 2026

Monthly Statistics	2025	2026
Public Trees Removed	2	4
Sand Applied to Roads (tons)	0	0
Ice Melt Applied to Roads (pounds)	0	0
Road Closures	5	2

Comments

We had two winter events.

Staff Communitactions:

0

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ADMINISTRATIVE REPORTS:
WATER AND PUBLIC WORKS

Water and Public Works report for the month of April 2026

Monthly Statistics	2025	2026
Calls for Service	34	39
Water Leaks Repaired	2	0
New Water Lines Installed	0	0
Water Meter Replacements	2	2
Gallons of Water Produced	2,845,583	3,552,464
Hours Pumped (11 wells combined)	1,805	1,722
Water Samples Taken	5	1

Comments
0

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ADMINISTRATIVE REPORTS:
SANITATION

Sanitation Department report for the month of April 2026

Monthly Statistics	2025	2026
Tons of Curbside Trash Collected	26.09	7.6
Tons of Curbside Recycling Collected	1.58	2.5
Unique Curbside Sanitation Stops	1780	1720
Special Pickup Stops	9	3
Bagged Leaf Pickup	264	302
Brush Pickup (cubic yards)	5 Loads	5 Loads
Hauling Fees	4991.1	5031
Tipping Fees	1736.61	899.4
Dumpster Rental Fees	681.21	372.02
Tons Convenience Center Usage-Trash	9.38	9.66
Tons Convenience Center Usage-Recycle	2.19	2.25

Comments:

0

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ADMINISTRATIVE REPORTS:
ZONING ADMINISTRATION

Zonning Administration report for the month of April 2026

Monthly Statistics	2025	2026
Approved Zoning Permits	3	4
Denied Zoning Permits	0	0
Pending Zoning Permits	2	5
Variance/Interpretation Granted	0	0
Special Use Permits Granted	0	0
Permit Extensions Granted	0	0
Notice of Violations	0	0

Comments
0

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ADMINISTRATIVE REPORTS:
ADMINISTRATION

Town Administration report for the month of May 2026

Monthly Statistics	2025	2026
Public Meetings	6	5
Public Records Requests Processed	3	1
Water Bills Processed & Mailed	648	623
Water Bills Processed & Emailed	58	93
Leak Adjustments	2	3
Sunshine List Messages	17	17
Website Posts	17	17
Social Media Posts	17	17

Upcoming Events and Schedule Changes
0

Comments
N/A

Staff Communications
0

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ADMINISTRATIVE REPORTS:
STREETS

Streets Department report for the month of May 2026

Monthly Statistics	2025	2026
Public Trees Removed	2	3
Sand Applied to Roads (tons)	0	0
Ice Melt Applied to Roads (pounds)	0	0
Road Closures	4	5

Comments

We had two winter events.

Staff Communitactions:

0

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ADMINISTRATIVE REPORTS:
WATER AND PUBLIC WORKS

Water and Public Works report for the month of May 2026

Monthly Statistics	2025	2026
Calls for Service	37	24
Water Leaks Repaired	1	0
New Water Lines Installed	0	0
Water Meter Replacements	0	0
Gallons of Water Produced	2,393,472	3,366,408
Hours Pumped (11 wells combined)	1,771	1,962
Water Samples Taken	1	1

Comments
0

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ADMINISTRATIVE REPORTS:
SANITATION

Sanitation Department report for the month of May 2026

Monthly Statistics	2025	2026
Tons of Curbside Trash Collected	9.81	7.68
Tons of Curbside Recycling Collected	2.88	2.12
Unique Curbside Sanitation Stops	1820	1740
Special Pickup Stops	14	11
Bagged Leaf Pickup	338	228
Brush Pickup (cubic yards)	4 Loads	4 Loads
Hauling Fees	3219.25	4799
Tipping Fees	1250.51	1841.3
Dumpster Rental Fees	131.9	272.02
Tons Convenience Center Usage-Trash	15.05	10.58
Tons Convenience Center Usage-Recycle	2.52	2.22

Comments:

0

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ADMINISTRATIVE REPORTS:
ZONING ADMINISTRATION

Zonning Administration report for the month of May 2026

Monthly Statistics	2025	2026
Approved Zoning Permits	2	1
Denied Zoning Permits	0	0
Pending Zoning Permits	3	10
Variance/Interpretation Granted	1	1
Special Use Permits Granted	0	0
Permit Extensions Granted	0	0
Notice of Violations	0	0

Comments
0

TOWN OF MONTREAT
NORTH CAROLINA

FINANCIAL REPORT

April 2026 - MONTH 10 OF FISCAL YEAR 2025-2026

REVENUES

Fund	Fund #	Original Budget	Current Budget	YTD Projected Budget Amount	YTD Projected Budget Percentage	YTD Collected	YTD Actual Percentage	Difference
GENERAL FUND	10	2,077,915.00	2,905,668.94	2,421,390.78	83.33%	2,333,227.45	80.30%	(88,163.33)
WATER FUND	30	424,900.00	506,511.13	422,092.61	83.33%	433,717.48	85.63%	11,624.87
TOTAL REVENUES GENERAL & WATER FUNDS		**2,502,815.00**	**3,412,180.07**	**2,843,483.39**	**83.33%**	**2,766,944.93**	**81.09%**	**(76,538.46)**

EXPENSES

Dept Name	Fund #	Original Budget	Current Budget	YTD Projected Budget Amount	YTD Projected Budget Percentage	YTD Exp	YTD Actual Percentage	Difference
GOVERNING BODY	10	53,222.00	53,222.00	44,351.67	83.33%	41,031.32	77.09%	3,320.35
ADMINISTRATION	10	560,714.00	560,714.00	467,261.67	83.33%	471,434.39	84.08%	(4,172.72)
PUBLIC BUILDINGS	10	128,097.00	128,097.00	106,747.50	83.33%	37,611.39	29.36%	69,136.11
POLICE	10	539,521.00	553,218.00	461,015.00	83.33%	427,268.65	77.23%	33,746.35
BUILDING AND ZONING	10	99,900.00	99,900.00	83,250.00	83.33%	71,745.25	71.82%	11,504.75
PUBLIC WORKS	10	152,142.00	152,142.00	126,785.00	83.33%	114,165.41	75.04%	12,619.59
STREET	10	313,369.00	1,105,425.94	921,188.28	83.33%	422,524.17	38.22%	498,664.11
SANITATION	10	208,900.00	230,899.67	192,416.39	83.33%	177,493.75	76.87%	14,922.64
ENVIRON,CONS,REC	10	22,050.00	22,050.00	18,375.00	83.33%	15,573.00	70.63%	2,802.00
TOTAL EXPENSES GENERAL FUND		2,077,915.00	**2,905,668.61**	**2,421,390.51**	**83.33%**	**1,778,847.33**	**61.22%**	**642,543.18**

Dept Name	Fund #	Original Budget	Budget	YTD Projected Budget Amount	YTD Projected Budget Percentage	YTD Exp	YTD Actual Percentage	Difference
WATER	30	424,900.00	506,511.13	422,092.61	83.33%	401,406.11	79.25%	20,686.50
TOTAL EXPENSES WATER FUND		424,900.00	**506,511.13**	**422,092.61**	**83.33%**	**401,406.11**	**79.25%**	**20,686.50**

TOTAL EXPENSES GENERAL & WATER FUNDS	**$3,412,179.74**	**$2,843,483.12**	**83.33%**	**$2,180,253.44**	**63.90%**	**$663,229.68**

GENERAL FUND INCOME/LOSS - YTD	**$554,380.12**
WATER FUND INCOME/LOSS - YTD	**$32,311.37**
NET INCOME - YTD 2026	**$586,691.49**

SPECIAL PROJECTS

Project	Fund #		Budget	This Month Actual	Amount Spent To Date	Balance Remaining		% Spent
LANDCARE	26		133,488.08	9,649.34	42,251.81	91,236.27		31.65%
Hurricane Helene - Prof. Services	29		367,439.87	0.00	327,316.45	40,123.42		
Helene Materials	29		76,406.32	429.20	51,865.76	24,540.56		
Helene Consultants	29		95,000.00	5,725.00	77,565.78	17,434.22		
Helene - Professional SVCS - WithersRavenel Eng. Contract	29		111,000.00	9,242.50	55,766.75	55,233.25		
Helene - Professional SVCS - WithersRavenel CULVERTS	29		246,994.27	125,665.00	227,615.49	19,378.78		
TOTAL SPECIAL PROJECTS			**$ 577,334.27**	**$ 10,078.54**	**$ 554,766.55**	**$ 247,946.50**		96.09%

Contracted - not available

TOWN OF MONTREAT
NORTH CAROLINA

Tax Receipts

Date of Deposit	Dec-24	Dec-25	% +/-	Jan-25	Jan-26	% +/-	Feb-25	Feb-26	% +/-	Mar-25	Mar-26	% +/-	Apr-25	Apr-26	% +/-
AdVal/RMV	298,581.86	269,837.81	-10.65%	415,257.27	392,316.43	-5.85%	247,023.30	230,699.11	-7.08%	33,162.73	26,670.88	-24.34%	14,594.97	16,052.32	9.08%
Sales	44,719.23	50,127.04	10.79%	44,323.60	51,130.28	13.31%	51,905.25	51,237.24	-1.30%	57,136.33	55,260.52	-3.39%	43,604.69	42,024.73	-3.76%
Solid Waste (Quarterly)							199.24	222.33	10.39%						
Utility Fran (Quarterly)	31,727.74	28,467.94 QE 9/30/25	-11.45%							25,954.36	24,572.23 QE12/31/25	-5.62%			
Wine/Beer (Annual-May)															

AdVal Tax is received the month after the tax is collected

RMV Tax is received two months after the tax is collected

Sales Tax is received three months after the tax is collected

TOWN OF MONTREAT
NORTH CAROLINA

FINANCIAL REPORT

May 2026 - MONTH 11 OF FISCAL YEAR 2025-2026

REVENUES

Fund	Fund #	Original Budget	Current Budget	YTD Projected Budget Amount	YTD Projected Budget Percentage	YTD Collected	YTD Actual Percentage	Difference
GENERAL FUND	10	2,077,915.00	2,905,668.61	2,663,529.56	91.67%	2,905,910.19	100.01%	242,380.63
WATER FUND	30	424,900.00	506,511.13	464,301.87	91.67%	469,189.76	92.63%	4,887.89
TOTAL REVENUES GENERAL & WATER FUNDS		**2,502,815.00**	**3,412,179.74**	**3,127,831.43**	**91.67%**	**3,375,099.95**	**98.91%**	**247,268.52**

EXPENSES

Dept Name	Fund #	Original Budget	Current Budget	YTD Projected Budget Amount	YTD Projected Budget Percentage	YTD Exp	YTD Actual Percentage	Difference
GOVERNING BODY	10	53,222.00	53,222.00	48,786.83	91.67%	42,155.06	79.21%	6,631.77
ADMINISTRATION	10	560,714.00	560,714.00	513,987.83	91.67%	511,775.50	91.27%	2,212.33
PUBLIC BUILDINGS	10	128,097.00	128,097.00	117,422.25	91.67%	126,251.03	98.56%	(8,828.78)
POLICE	10	539,521.00	553,218.00	507,116.50	91.67%	475,334.29	85.92%	31,782.21
BUILDING AND ZONING	10	99,900.00	99,900.00	91,575.00	91.67%	78,405.70	78.48%	13,169.30
PUBLIC WORKS	10	152,142.00	152,142.00	139,463.50	91.67%	129,498.12	85.12%	9,965.38
STREET	10	313,369.00	1,105,425.94	1,013,307.11	91.67%	459,904.82	41.60%	553,402.29
SANITATION	10	208,900.00	230,899.67	211,658.03	91.67%	195,506.37	84.67%	16,151.66
ENVIRON,CONS,REC	10	22,050.00	22,050.00	20,212.50	91.67%	19,573.00	88.77%	639.50
TOTAL EXPENSES GENERAL FUND		2,077,915.00	**2,905,668.61**	**2,663,529.56**	**91.67%**	**2,038,403.89**	**70.15%**	**625,125.67**

Dept Name	Fund #	Original Budget	Budget	YTD Projected Budget Amount	YTD Projected Budget Percentage	YTD Exp	YTD Actual Percentage	Difference
WATER	30	424,900.00	506,511.13	464,301.87	91.67%	422,573.24	83.43%	41,728.63
TOTAL EXPENSES WATER FUND		424,900.00	**506,511.13**	**464,301.87**	**91.67%**	**422,573.24**	**83.43%**	**41,728.63**

TOTAL EXPENSES GENERAL & WATER FUNDS	**$3,412,179.74**	**$3,127,831.43**	**91.67%**	**$2,460,977.13**	**72.12%**	**$666,854.30**

GENERAL FUND INCOME/LOSS - YTD	**$867,506.30**
WATER FUND INCOME/LOSS - YTD	**$46,616.52**
NET INCOME - YTD 2026	**$914,122.82**

SPECIAL PROJECTS

Project	Fund #		Budget	This Month Actual	Amount Spent To Date	Balance Remaining		% Spent
LANDCARE	26		133,488.08	5,661.90	47,913.71	85,574.37		35.89%
Hurricane Helene - Prof. Services	29		367,439.87	3,000.00	327,316.45	40,123.42		
Helene Materials	29		76,406.32	1,969.91	53,835.67	22,570.65		
Helene Consultants	29		95,000.00	0.00	77,565.78	17,434.22		
Helene - Professional SVCS - WithersRavenel Eng. Contract	29		111,000.00	4,312.25	60,079.00	50,921.00		
Helene - Professional SVCS - WithersRavenel CULVERTS	29		246,994.27	15,650.00	243,265.49	3,728.78		
TOTAL SPECIAL PROJECTS			**$ 577,334.27**	**$ 10,631.81**	**$ 566,710.61**	**$ 220,352.44**		98.16%

Contracted - not available

TOWN OF MONTREAT
NORTH CAROLINA

Tax Receipts

Mar-25	Mar-26	% +/-	Apr-25	Apr-26	% +/-	May-25	May-26	% +/-	Jun-25	Jun-26	% +/-
33,162.73	26,670.88	-24.34%	14,594.97	16,052.32	9.08%	5,021.05	5,175.16	2.98%	0.00		#DIV/0!
57,136.33	55,260.52	-3.39%	43,604.69	42,024.73	-3.76%	43,433.16	42,670.02	-1.79%	52,955.67		#DIV/0!
						204.41	193.06	-5.88%			
25,954.36	24,572.23	-5.62%							34,514.41		#DIV/0!
	QE12/31/25										
						4,154.49	4,116.57	-0.92%			

Montreat Police Department

Monthly Statistics - April 2026

# of Calls	Call Nature
11	Admin / Maintenance
0	Alarm
2	Assist EOC
4	Assist Motorist
9	Assist Other Agency
0	Community Outreach
2	Contact Public
0	Debris Blocking Roadway
0	Direct Traffic
0	Domestic Animal Problem
1	Domestic Disturbance
1	Follow Up Investigation
2	Foot Patrol
1	Improper Parking
2	Investigate
0	Loud Noise
0	Motor Vehicle Crash
86	Property Check
0	Suspicious Person
1	Suspicious Vehicle
2	Traffic Enforcement
13	Traffic Stop
0	Welfare Check
0	Wildlife

137 **Total # of Calls**

Montreat Police Department

Monthly Statistics - May 2026

# of Calls	Call Nature
0	Admin / Maintenance
1	Alarm
0	Assist EOC
0	Assist Motorist
5	Assist Other Agency
1	Community Outreach
9	Contact Public
2	Debris Blocking Roadway
2	Direct Traffic
0	Domestic Animal Problem
0	Domestic Disturbance
0	Follow Up Investigation
0	Foot Patrol
0	Improper Parking
2	Investigate
1	Loud Noise
0	Motor Vehicle Crash
84	Property Check
0	Suspicious Person
0	Suspicious Vehicle
2	Traffic Enforcement
8	Traffic Stop
2	Welfare Check
2	Wildlife

121 **Total # of Calls**

April & May Building Permits Issued

Building Permits Issued
Between 3/30/2026 and 4/12/2026
for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date
BLD2026-00801	Residential New Deck	MONROE/ADDING RAMP TO DECK	071064877900000	4/10/2026
BLD2026-00923	Residential Retaining Wall	Boheme Investement/Retaining Wall	072111796600000	4/10/2026
BLD2026-00894	Residential Renovation or Remodel	TAYLOR-Remodel existing outdoor kitchen	072016842100000	4/9/2026
CBO2026-00822	Residential Combo Permit	WILL STONE	071086643300000	4/7/2026
BLD2026-00703	Residential New Deck	Fraser/Roof Over Existing Patio	072007494600000	4/6/2026

Print Date: 4/13/2026

Building Permits Issued
Between 4/13/2026 and 4/26/2026
for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date
BLD2026-01022	Residential New Deck	WALKUP/REBUILD EXISTING DECK	072008957900000	4/21/2026
BLD2026-01047	Residential Addition and Renovation	MARR-ADDITION AND RENOVATION	071076945200000	4/21/2026
ELE2026-00493	Electrical Permit	ALLEN -Replacing a 200 amp meter base because it has corroded	072005014300000	4/21/2026

CBO2026-00938	Residential Combo Permit	Ginny Newell	072007375800000	4/20/2026
CBO2026-00907	Residential Combo Permit	Sally Jenkins	071065665200000	4/16/2026
BLD2026-00951	Residential Addition and Renovation	MARTHA-RESIDENTIAL ADDITION & RENOVATION	072015446600000	4/15/2026
MEC2026-00070	Mechanical Permit	Sally Jenkins	071065665200000	4/13/2026

Building Permits Issued Between 5/4/2026 and 5/17/2026 for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date
BLD2026-01352	Residential Renovation or Remodel	ERVIN/GARAGE RENOVATION	071044629500000	5/15/2026
BLD2026-00645	Commercial Deck	WILLIAM BLACK LODGE/NEW DECK	071096792800000	5/12/2026
BLD2026-01264	Residential Renovation or Remodel	FRANSEEN-INTERIOR RENOVATION	071074622200000	5/11/2026
MEC2026-00096	Mechanical Permit	james foreman	072016622800000	5/5/2026

Building Permits Issued Between 5/18/2026 and 5/31/2026 for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date

BLD2026-01371	Commercial Interior Alteration	LODGE-COMMERCIAL INTERIOR ALTERATION	071096792800000	5/26/2026
ELE2026-00614	Electrical Permit	Zorn	071054358300000	5/20/2026
ELE2026-00613	Electrical Permit	Burriss	072100569500000	5/19/2026
BLD2026-01380	Residential Renovation or Remodel	STANSTILL-RESIDENTIAL RENOVATION	071075380300000	5/18/2026

Montreat Inspections

Building Inspections
Between 3/30/2026 and 4/12/2026
for Montreat City

Case#	Inspection	Inspector	Result	Inspection Dt	Result Comment
BLD2025-03117	Plumbing Rough	David Elkins	Pass	4/9/2026	WATER AND WASTE PIPING FOR LOCKER ROOMS AND BATHS. PRESSURE TESTS OK. PENETRATIONS IN RATED AREAS TO BE ADDRESSED BY FRAMING AS DISCUSSED.

BLD2025-03117	Mechanical Gas Piping	David Elkins	Pass	4/9/2026	BLACK IRON GAS PIPING SIZED PER PLAN DESIGN. PRESSURE TEST OK.
BLD2025-03117	Electrical Rough	David Elkins	Pass	4/9/2026	WALL ROUGH IN ONLY FOR OFFICES, WRESTLING ROOMS, TRAINING ROOMS, SPORTS ROOM. PUTTY PACKS IN RATED AREAS AS REQUIRED.
BLD2025-03133	Mechanical Final	David Elkins	Pass	4/9/2026	
BLD2025-03133	Building Final	David Elkins	Pass	4/9/2026	
CBO2026-00629	Electrical Final	David Elkins	Pass	4/9/2026	
CBO2026-00629	Mechanical Final	David Elkins	Pass	4/9/2026	
BLD2026-00655	Mechanical Rough	David Elkins	Pass	4/7/2026	LINE SET FOR MINI SPLIT SYSTEM IN SUNROOM.
BLD2025-03661	Mechanical Rough	David Elkins	Pass	4/7/2026	EXISTING SYSTEM USED. HOOD AND BATHROOM FAN EHAUSTS ADDED.
BLD2025-03661	Plumbing Other	David Elkins	Pass	4/7/2026	KERDI-SCHLUTER SYSTEM. 2" WATER TEST COMPLIANT.
BLD2026-00655	Electrical Rough	David Elkins	Pass	4/7/2026	CIRCUITS FOR RECEPTACLES AND MINI SPLIT. #12 UF CABLE UNDERGROUND.
BLD2026-00655	Electrical Underground Electric	David Elkins	Pass	4/7/2026	CIRCUITS FOR RECEPTACLES AND MINI SPLIT. #12 UF CABLE UNDERGROUND.
BLD2025-02791	Plumbing Rough	Grover Clark	Pass	4/2/2026	TEST ON WATER LINES GOOD. 100 PSI. NO CHANGE TO EXISTING DRAIN SYSTEM
BLD2025-02791	Electrical Rough	Grover Clark	Pass	4/2/2026	TALKED TO ELEC. CONTRACTOR ABOUT EXTENDED CIRCUIT THAT NEED AFCI PROTECTION.
CBO2026-00631	Mechanical Final	Grover Clark	Fail	4/2/2026	CALLED OWNER AT 12:50 PM AND WAS AT HOSPITAL AND COULD NOT BE HOME FOR INSPECTION. WILL NEED TO RESCHEDULE.
BLD2025-03117	Building Footing	Keynan Phillips	Pass	4/2/2026	7 30 x 30 piers with 4 #5 bars ea way
CBO2026-00631	Electrical Final	Grover Clark	Fail	4/2/2026	CALLED OWNER AT 12:50 PM AND WAS AT HOSPITAL AND COULD NOT BE HOME FOR INSPECTION. WILL NEED TO RESCHEDULE.
BLD2026-00553	Building Footing	David Elkins	Pass	3/31/2026	Corrections made.Piers sized per plan with two #4 bars each way.

BLD2025-03133	Electrical Final	David Elkins	Pass	3/31/2026
BLD2025-03133	Plumbing Final	David Elkins	Pass	3/31/2026

Building Inspections
Between 4/13/2026 and 4/26/2026
for Montreat City

Case#	Inspection	Inspector	Result	Inspection Dt	Result Comment
ELE2026-00493	Electrical Final	David Elkins	Pass	4/24/2026	
BLD2026-00458	Building Final	David Elkins	Fail	4/24/2026	NO RECORD ON FILE FOR THE FOUR REQUESTED INSPECTIONS RECOMMENDED BY GENTRY GEOTECH .
BLD2026-01047	Electrical Construction Service	David Elkins	Fail	4/23/2026	A customer owned construction meter is not allowed on a utility owned power pole. Need power pole with GFCI protected outlets in place for construction use.
BLD2026-00132	Plumbing Final	David Elkins	Pass	4/23/2026	
BLD2026-00132	Building Final	David Elkins	Pass	4/23/2026	
BLD2026-00132	Mechanical Final	David Elkins	Pass	4/23/2026	
BLD2026-00132	Electrical Final	David Elkins	Pass	4/23/2026	
BLD2026-00703	Building Footing	Grover Clark	Fail	4/22/2026	STILL NEED ENGINEERING AS WAS STATED AT PREVIOUS INSPECTION. THE TWO FOOTINGS THAT WERE DUG UNDER EXISTING WALL ARE OK.
BLD2025-03075	Building Final	David Elkins	Fail	4/21/2026	TRADES MUST PASS. ALL EXTERIOR DOOR HARDWARE MUST BE IN PLACE. NO INSULATION IN PLACE IN FLOOR OF SUNROOM. IT APPEARS THAT IT WAS TAKEN OUT. R-19 MINIMUM REQUIRED.
BLD2025-03075	Plumbing Final	David Elkins	Fail	4/21/2026	NEW WATER HEATER DOES NOT INDIRECTLY DISCHARGE FROM THE CRAWL SPACE THROUGH AN AIR GAP.

BLD2025-03075	Electrical Final	David Elkins	Fail	4/21/2026	SMOKE DETECTOR CANNOT BE WITHIN 3' OF BATHROOM DOOR. CONDUCTOR SERVING NEW WATER HEATER MIGHT NEED REPLACED. IT IS NOT LONG ENOUGH TO SAFELY TERMINATE IN APPLIANCE.
BLD2025-03075	Mechanical Final	David Elkins	Fail	4/21/2026	CANNOT SEE WHERE BATH FAN TERMINATES ON EXTERIOR.
BLD2026-00664	Building Insulation	David Elkins	Pass	4/21/2026	INSPECTION OF FRAMING AND R-19 INSULATION IN CRAWL SPACE ONLY.
BLD2026-00664	Building Frame	David Elkins	Pass	4/21/2026	INSPECTION OF FRAMING AND R-19 INSULATION IN CRAWL SPACE ONLY.
BLD2026-00703	Building Footing	David Elkins	Fail	4/20/2026	ONLY TWO FOOTINGS WERE DUG FOR INSPECTION, ONE OF WHICH IS SOFT. THE DRAWING SHOWS SIX ADDITIONAL PIER FOOTINGS UNDER EXISTING ROCK WALL. THOSE FOOTINGS WERE NOT PREPPED. THE EXISTING FOOTING SUPPORTING 2' ROCK WALL IS NOT GREATER THAN 9" IN WIDTH. IF OLD ROCK WALLIS TO BE USED TO SUPPRT A NEW COVERED AREA IT WILL NEED A DESIGN.
BLD2025-03661	Building Frame	David Elkins	Fail	4/20/2026	NO DECK FLASHING BETWEEN DECK BAND AND EXISTING STRUCTURE. LATERALBRACING HARDWARE NOT COMPLIANT.
BLD2025-03661	Electrical Rough	David Elkins	Pass	4/20/2026	FLOOD LIGHT, FAN, PORCH LIGHT, AND GFCI RECEPTACLE.
BLD2025-03117	Building Slab	David Elkins	Pass	4/20/2026	CORRECTIONS MADE FROM PREVIOUS INSPECTION FOR EXTERIOR SLAB.
BLD2025-03466	Building Footing	David Elkins	Pass	4/20/2026	CORRECTIONS MADE TO HORIZONTAL AND VERTICAL STEEL WITH THE EXCEPTION OF FOOTING SECTION A. THE PLAN DOES CALL FOR VERTICAL DOWELS TO BE EPOXIED IN AT 48" CENTERS. THIS MUST BE INSPECTED WHEN INSTALLED. STEEL FOR SERVICE ELECTRODE IS TURNED UP INTO THE FAR SIDE OF THE STRUCTURE.
BLD2025-03117	Building Slab	David Elkins	Fail	4/17/2026	#5 NOT CONTINUOUS AROUND EDGES PER PLAN DETAIL.
BLD2025-03466	Building Footing	David Elkins	Fail	4/16/2026	FOOTING STEEL IS NOT INSTALLED PER PLAN DESIGN. CANNOT HAVE WOOD GRADE PEGS IN FOOTINGS. POST FOOTINGS NOT DUG OUT FOR THIS INSPECTION.
BLD2025-03262	Building Frame	David Elkins	Pass	4/16/2026	WHEN FRAMING FOR DOULE WINDOW IS ADDED SCHEDULE FOR INSPECTION. ENSURE ENGINEERING IS UPLOADED FOR HEADERS.

BLD2025-03262	Mechanical Rough	David Elkins	Pass	4/16/2026	CORRECTIONS MADE.
BLD2025-03117	Building Frame	David Elkins	Fail	4/16/2026	CONTRACTOR CANCELED. CONTRACTOR TO CONSULT WITH ARCHITECT CONCERNING ALL RATED AREAS INCLUDING EXIT CORRIDORS.
BLD2026-00801	Building Footing	David Elkins	Pass	4/16/2026	CORRECTIONS MADE.
BLD2025-03117	Mechanical Rough	David Elkins	Pass	4/14/2026	NOT A ROUGH IN. THIS IS A DUCT SEAL INSPECTION FOR THE SOFFIT AREAS ONLY IN THE TRAINING ROOM AND WRESTLING ROOM.
BLD2026-00801	Building Footing	David Elkins	Fail	4/14/2026	THREE OF THE PIER FOOTINGS AT THE FIRST LANDING ARE SOFT DOWN ABOUT 8"
BLD2025-03262	Mechanical Rough	David Elkins	Fail	4/14/2026	USE PROPER NAIL PLATES FOR DRYER EXHAUSTS. DRYER EXHAUST SEAMS NOT TAPED. UPPER LEVEL BATH EXHAUST NOT IN PLACE.

Building Inspections
Between 4/27/2026 and 5/10/2026
for Montreat City

Case#	Inspection	Inspector	Result	Inspection Dt	Result Comment
BLD2025-03117	Electrical Underground Electric	Grover Clark	Pass	5/8/2026	2- 2" CONDUITS FOR COMMUNICATION FROM POLE TO J BOX ON SIDE OF BUILDING.
PLM2026-00196	Plumbing Final	David Elkins	Fail	5/8/2026	Could not locate the cabin work was done in. No one on site for inspection. Contractor said it would be rescheduled next week.
BLD2026-01047	Electrical Construction Service	David Elkins	Pass	5/6/2026	
BLD2025-03117	Mechanical Rough	Keynan Phillips	Pass	5/5/2026	Duct seal on everything except elevator area
BLD2025-03117	Plumbing Under	Keynan Phillips	Pass	5/4/2026	French drain where doors were removed

BLD2025-03117	Building Frame	Keynan Phillips	Fail	5/4/2026	Classroom only 3 exterior walls ok Others need framing or fire blocking because of combustible ceiling
BLD2026-01115	Building Footing	Grover Clark	Pass	5/4/2026	3 PIER FOOTINGS FOR COLUMNS TO BE REPLACED- 24"X24"X18" WITH #5 MATS 6" EACH WAY. STILL HAS A COUPLE MORE FOOTINGS TO INSPECT LATER.
BLD2025-03644	Building Foundation	Grover Clark	Pass	5/4/2026	WATERPROOFING AND DRAIN WITH STONE AND CLOTH
BLD2026-00894	Building Frame	Grover Clark	Done	5/1/2026	consultation about grill and hood on a porch. talked to contractor about using manufactures spec for this project.
BLD2025-03189	Building Footing	David Elkins	Pass	4/30/2026	STEEL IN PLACE AS DESIGNED. ANCHORS WERE NOT PRESENT. ARCHITECT WILL ADDRESS ANCHORS TO BE EPOXIED INTO PIERS.
BLD2026-00703	Building Footing	David Elkins	Pass	4/30/2026	CORRECTIONS MADE. NEW DESIGN ELIMINATES ROCK WALL SUPPORT.
BLD2025-03075	Mechanical Final Re-Inspection	David Elkins	Pass	4/30/2026	CORRECTIONS MADE.
BLD2025-03075	Electrical Final Re-Inspection	David Elkins	Pass	4/30/2026	CORRECTIONS MADE.
BLD2025-03075	Building Final Re-Inspection	David Elkins	Pass	4/30/2026	CORRECTIONS MADE.
BLD2025-03075	Plumbing Final Re-Inspection	David Elkins	Pass	4/30/2026	CORRECTIONS MADE.
BLD2026-01116	Electrical Rough	Grover Clark	Pass	4/29/2026	MOVED OUTLETS IN BEDROOM AND BATHROOM. ADDED OUTLET FOR BEDAY.
BLD2026-01115	Building Other	Grover Clark	Pass	4/29/2026	CONSULATION ABOUT HOW TO PROCEDE WITH FOOTING AND COLUMNS UNDER PORCH.
BLD2026-01022	Building Footing	Grover Clark	Pass	4/29/2026	12 PIER FOOTING --18"X18"X18"
CBO2026-00822	Mechanical Final	Grover Clark	Pass	4/29/2026	
CBO2026-00822	Electrical Final	Grover Clark	Pass	4/29/2026	EXISTING POWER
BLD2026-00458	Building Final Re-Inspection	Grover Clark	Done	4/29/2026	3RD PARTY INSPECTION WITH REGISTERED DESIGN PROFESSIONAL INSPECTION FORM UPLOADED TO PORTAL.
BLD2025-03262	Building Insulation	David Elkins	Pass	4/28/2026	R-15 AND R-19 IN AREAS REQUIRED. UPLOAD RES CHECK AND ESR REPORT.
BLD2026-01116	Electrical Rough	David Elkins	Fail	4/28/2026	NO ONE AT HOME OR AT WORK AREA 12PM. WORK IN PROGRESS APPEARS TO BE MORE THAN ON SCOPE

					SUBMITTED FOR APPROVAL. ANY ADDITIONAL STRUCTURAL WORK WILL NEED INSPECTED AND POSSIBLE DESIGNED.
BLD2026-00458	Building Final Re-Inspection	David Elkins	Fail	4/27/2026	THE THIRD PARTY EVALUATION FORM AVAILABLE ON OR WEBSITE MUST BE FILLED OUT BY THE LISTED DESIGN PROFESSIONAL FOR FINAL APPROVAL. THE EVALUATION FORM MUST BE UPLOADED.
BLD2025-03661	Building Re-Inspection	Grover Clark	Pass	4/27/2026	CORRECTIONS MADE

Building Inspections
Between 5/11/2026 and 5/24/2026
for Montreat City

Case#	Inspection	Inspector	Result	Inspection Dt	Result Comment
PLM2026-00196	Plumbing Rough	David Elkins	Fail	5/22/2026	SEE PREVIOUS INSPECTION DETAILS ABOUT BUILDING PERMIT. ALL NEW PLUMBING DRAIN PIPING AND WATER LINES MUST BE TESTED.
CBO2026-00439	Electrical Rough	David Elkins	Fail	5/22/2026	ELECTRICAL WORK CONSISTS OF MORE THAN THE HEATING SYSTEM THE UPPER LEVEL APPEARS TO HAVE BEEN REWIRED. THE BATH RECEPTACLES ARE REQUIRED TO BE ON 20 AMP CIRCUITS. IF ADDING KITCHEN TWO 20 AMP SMALL APPLIANCE CIRCUITS ARE REQUIRED. NO SMOKE DETECTON DEVICES WIRED IN AS REQUIRED. SCOPE OF WORK ON CABIN EXCEEDS $40,000 PER PREVIOUS CONVERSATION WITH PROJECT MANAGER AND MUST BE ON A BUILDING PERMIT.
CBO2026-00439	Mechanical Rough	David Elkins	Fail	5/22/2026	LINE SETS RAN AND EQUIPMENT IN CRAWL SPACE. UPPER LEVEL BEING PARTIALY REMODELED. SCOPE OF REMODEL WORK EXCEEDS $40,000 MAX AND MUST BE ON A BUILDING PERMIT.
BLD2026-00553	Building Final	David Elkins	Pass	5/21/2026	
BLD2026-01352	Building Frame	David Elkins	Done	5/20/2026	NO INSPECTION. MET WITH CONTRACTOR TO DISCUSS PROJECT. WILL NEED TRUSS DESIGN FOR ANY REPAIRED TRUSSES. WILL NEED FIRE SEPARATION FROM GARAGE. WILL NEED FIRE RATED DOOR FROM GARAGE TO LIVING AREA.

					ANY TRADE WORK, INSULATION, OR STRUCTURAL WORK REPLACED WILL NEED BROUGHT UP TO CURRENT CODE. LIFE SAFETY ASPECTS APPLY.
BLD2026-00664	Building Frame	David Elkins	Pass	5/20/2026	CORRECTIONS MADE TO PREVIOUS INSPECTION.
BLD2026-00250	Building Other	Grover Clark	Pass	5/19/2026	steel for shell for pool completed.
BLD2025-03117	Building Frame	David Elkins	Pass	5/19/2026	THIS INSPECTION COVERS THE INTERIOR OFFICES AND WRESTLING ROOM ON LOWER LEVEL. THE REMAINING FRAMING FOR LOWER LEVEL CORRIDORS, CLASSROOMS, TRAINING ROOM, AND UPPER LEVEL FRAMING TO BE INSPECTED ONCE LIFE SAFETY, EGRESS, AND EXIT PASSAGEWAY PLANS ARE APPROVED. BLOCK OFF AT SOFFIT AREAS PER DISCUSSION FOR NEXT INSPECTION.
BLD2026-00250	Electrical Bonding	Grover Clark	Pass	5/19/2026	BONDED IN 6 PLACES-IT WILL HAVE CONTINIOUS BOND WIRE WHEN HALO IS INSTALLED ON TOP AND WERE EQUIPMENT IS GOING. WE WILL NEED TO SEE THIS BEFORE COVERED
BLD2026-00250	Building Other	Grover Clark	Fail	5/19/2026	steel not ready
BLD2026-01022	Building Frame	Grover Clark	Pass	5/19/2026	
BLD2026-00645	Building Footing	David Elkins	Done	5/18/2026	THIRD PARTY DESIGN EVALUATION FORM ON FILE.
BLD2026-00553	Building Re-Inspection	David Elkins	Pass	5/18/2026	CORRECTIONS MADE TO PREVIOUS FRAMING INSPECTION.
BLD2025-03189	Building Footing	David Elkins	Pass	5/15/2026	FOUR 1/2" X 12" SQUARE WELD PLATES WITH ANCHOR BOLTS PER DESIGN.
BLD2026-00553	Building Frame	David Elkins	Fail	5/15/2026	FLOOR JOIST SUPPORT NON-COMPLIANT. FRAME GIRDERS PER DISCUSSION.
BLD2025-03117	Mechanical Rough	David Elkins	Pass	5/14/2026	REMAINING DUCT SEAL LOWER LEVEL AND LINE SETS FROM EQUIPMENT TO ROOF DECK..
BLD2025-03117	Electrical Above Ceiling	David Elkins	Pass	5/14/2026	RATED CEILING IN MAIN EXIT PASSAGEWAY UPPER LEVEL CORRIDOR FROM ELEVATOR TO MAIN ENTRANCE. ONLY.
BLD2025-03117	Plumbing Rough	David Elkins	Pass	5/14/2026	PRESSURE TESTSOK ON WATER AND WASTE PIPING SERVING MEN AND WOMENS RESTROOM LOWER LEVEL, FAMILY RESTROOM AND CONCESSION AREA UPPER LEVEL IN MAIN CORRIDOR.
BLD2026-00645	Building Footing	David Elkins	Fail	5/13/2026	THE FOUR PIE FOOTINGS WERE POURED PRIOR TO INSPECTING.

BLD2025-03117	Electrical Above Ceiling	David Elkins	Fail	5/13/2026	Electrician and job Superintendent not on site for inspection at 12:20pm.
PLM2026-00196	Plumbing Final Re-Inspection	David Elkins	Fail	5/12/2026	A building permit is required for the renovation of this cabin if project exceeds $40,000. Rep from the Lodge said total construction including deck is roughly $100,000
BLD2026-01115	Building Footing	David Elkins	Pass	5/12/2026	REMAINING TWO PIER FOOTINGS WITH #5 HORIZONTAL BARS EACH WAY.
BLD2025-03466	Plumbing Under	David Elkins	Pass	5/12/2026	PRESSURE TEST OK ON WASTE PIPING. 4" BUILDING DRAIN. NO WATER PIPING IN SLAB.
BLD2025-03632	Plumbing Rough	Grover Clark	Pass	5/12/2026	2ND FLOOR UNDER FLOOR--TEST ON DRAIN LINES GOOD 6 PSI AND WATER LINES UNDER WATER PRESSURE.
BLD2026-00025	Electrical Final	David Elkins	Pass	5/12/2026	
BLD2026-00025	Mechanical Final	David Elkins	Pass	5/12/2026	
BLD2026-00025	Plumbing Final	David Elkins	Pass	5/12/2026	
BLD2026-00664	Building Frame	Grover Clark	Fail	5/11/2026	NEED TO SEAL AROUND ALL WINDOWS INSIDE
BLD2026-00133	Electrical Final	Grover Clark	Pass	5/11/2026	EXISTING POWER
BLD2026-00133	Building Final	Grover Clark	Pass	5/11/2026	

Building Inspections
Between 5/25/2026 and 6/7/2026
for Montreat City

Case#	Inspection	Inspector	Result	Inspection Dt	Result Comment
BLD2025-03117	Building Insulation	David Elkins	Pass	6/5/2026	Lower level exit corridors, laundry, and golf room. Per plan detail.

BLD2025-03485	Building Final	Grover Clark	Fail	6/5/2026	NEED 3RD PARTY INSPECTION WITH REGISTERED DESIGN PROFESSIONAL INSPECTION FORM UPLOADED TO PORTAL.
CBO2026-00566	Mechanical Final	Grover Clark	Pass	6/5/2026	
CBO2026-00566	Electrical Final	Grover Clark	Pass	6/5/2026	EXISTING POWER
BLD2026-00664	Plumbing Final	Grover Clark	Pass	6/4/2026	
BLD2026-00664	Building Final	Grover Clark	Pass	6/4/2026	
BLD2025-03466	Building Slab	Grover Clark	Fail	6/4/2026	NEED TERMITE TREATMENT CERTIFICATE AND NEED TO BE UPLOADED TO PORTAL. BASEMENT PUT IN PER PLAN DESIGN
BLD2025-03117	Building Frame	David Elkins	Pass	6/3/2026	LOWER LEVEL WALL FRAMING FOR EAST EXIT CORRIDOR, GOLF ROOM, LAUNDRY ROOM, MENS AND WOMENS BATHROOMS.
BLD2025-03117	Electrical Rough	David Elkins	Pass	6/3/2026	IN WALL ROUGH FOR GOLF ROOM, LAUNDRY ROOM, MENS AND WOMENS BATHROOMS LOWER LEVEL.
BLD2026-00703	Electrical Final	Grover Clark	Pass	6/3/2026	EXISTING POWER
BLD2026-00703	Building Final	Grover Clark	Pass	6/3/2026	EXISTING POWER
CBO2026-00403	Mechanical Final	Grover Clark	Pass	6/2/2026	
CBO2026-00403	Electrical Final	Grover Clark	Pass	6/2/2026	EXISTING POWER
ELE2026-00613	Electrical Final	Grover Clark	Pass	6/1/2026	EXISTING POWER
ELE2026-00613	Electrical Rough	Grover Clark	Pass	6/1/2026	
BLD2026-01047	Building Footing	Grover Clark	Pass	6/1/2026	3 #4 REBAR WITH #4 VERTICAL STEEL ON LOWER SIDE 24" O.C.
BLD2026-01047	Building Footing	Grover Clark	Fail	5/29/2026	not ready
BLD2025-03117	Mechanical Other	David Elkins	Pass	5/29/2026	DUCT SEAL INSPECTION FOR MAIN LEVEL MENS AND WOMENS LOCKER ROOMS.
BLD2026-00951	Building Insulation	Grover Clark	Pass	5/29/2026	R19 IN 2X6 WALLS. R19 WAS ADDED BETWEEN THE 1ST AND 2ND FLOOR.

BLD2026-01371	Building Insulation	Grover Clark	Pass	5/29/2026	R15 ADDED TO EXTERIOR WALLS IN LIVING ROOM AND BATHROOM BACK SIDE OF CABIN.
BLD2025-03117	Building Insulation	David Elkins	Pass	5/28/2026	INSULATION AND SOUNDPROOFING FOR WRESTLING ROOM, AND OFFICES OFF WRESTLING ROOM AND WEIGHT ROOM.
BLD2026-00951	Plumbing Re-Inspection	Grover Clark	Pass	5/27/2026	TEST ON DRAIN LINES GOOD 5 PSI
BLD2026-00951	Building Frame	Grover Clark	Pass	5/27/2026	PER ENGINEER'S DESIGN. UPLOADED TO PORTAL
BLD2026-01371	Building Frame	Grover Clark	Pass	5/27/2026	
BLD2026-01371	Mechanical Rough	Grover Clark	Pass	5/27/2026	MINI SPLIT
BLD2026-01371	Plumbing Rough	Grover Clark	Pass	5/27/2026	
BLD2026-01371	Electrical Rough	Grover Clark	Pass	5/27/2026	
BLD2026-00703	Building Final	Grover Clark	Fail	5/27/2026	BUILDING PORTION OF THIS IS GOOD BUT ELECTRICAL WORK HAS BEEN DONE ON THIS PORCH. NO ELECTRICAL ON PERMIT OR NO STAND-ALONE PERMIT HAS BEEN OBTAINED.
BLD2026-00951	Building Frame	Grover Clark	Fail	5/26/2026	NEED ENGINEERING FOR NEW LVL'S AND NEED PLUMBING ROUGH IN TO PASS.
BLD2026-00951	Electrical Rough	Grover Clark	Pass	5/26/2026	
BLD2026-00951	Plumbing Rough	Grover Clark	Fail	5/26/2026	NEED TEST ON ALL NEW DRAIN LINES

Montreat Permits CO & COC Issued

Building Permit CO's and COC's Issued Between 3/30/2026 and 4/12/2026 for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date
BLD2025-03133	Residential Renovation or Remodel	BLAKE/RENOVATION	072007874300000	4/9/2026

Building Permit CO's and COC's Issued Between 4/13/2026 and 4/26/2026 for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date

No CO/COC's issued during timeframe

Print Date: 4/27/2026

Building Permit CO's and COC's Issued Between 5/4/2026 and 5/17/2026 for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date

BLD2026-00133	Residential Renovation or Remodel	BELL INVESTMENTS - RESIDENTIAL RENOVATION	072007768600000	5/11/2026

Building Permit CO's and COC's Issued Between 5/18/2026 and 5/31/2026 for Montreat City

Case#	Case Type	Application Name	PIN	Issued Date
BLD2026-00553	Residential New Deck	MCCARLEY PROPERTIES-RESIDENTIAL NEW DECK	071096181400000	5/21/2026

TOWN OF MONTREAT POLICE CHIEF
OATH OF OFFICE

"I, _____, do solemnly swear (or affirm) that I will be alert and vigilant to enforce the criminal laws of the State; that I will not be influenced in any manner on account of personal bias or prejudice; that I will support and maintain the Constitution and laws of the United States, and the Constitution and laws of North Carolina not inconsistent therewith, and that I will faithfully and impartially discharge and execute the duties of my office as a law enforcement officer according to the best of my skill, abilities and judgment, so help me God."

This, the _____ day of June 2026.

_____
Justyn Whitson, Police Chief

_____
Tim Helms, Mayor

Witness: _____
Savannah Parrish, Town Manager

RESOLUTION #_____

RESOLUTION ALLOW BUNCOMBE COUNTY TO ASSESS THE UNIFIED FIRE PROTECTION AND AMBULANCE AND RESCUE SERVICE DISTRICT TAX WITHIN THE TERRITIORIAL JURSIDITION OF THE TOWN OF MONTREAT

WHEREAS, pursuant to N.C. Gen. Stat. § 153A-301, the board of county commissioners may create county service districts to finance fire protection services within a service district's boundaries; and

WHEREAS, pursuant to N.C. Gen. Stat. § 153A-302(a1), territory lying within the corporate limits of a city or sanitary district may not be included unless the governing body of the city or sanitary district agrees by resolution to such inclusion; and

WHEREAS, on April 21, 2026, the County consolidated twenty (20) Fire Protection Service Districts into one (1) Fire Protection and Ambulance and Rescue Service District covering the entire County (herein "Unified Service District"); and

WHEREAS, the Town Counsel believes it is the best interest of the residents of the Town of Montreat to include the property located within the Town of Montreat in the Unified Service District to fund fire protection services.

NOW, THEREFORE, BE IT RESOLVED by the Town Council of the Town of Montreat as follows:

1. That the corporate limits of the Town of Montreat shall be included within the Unified Service District.

4. That this resolution shall be effective on July 1, 2026.

This the __ day of June 2026.

ATTEST

_____
_____, Clerk

TOWN OF MONTREAT

By: _____
_____, Mayor

APPROVED AS TO FORM

_____
Town Attorney

RESOLUTION NO. _____

A RESOLUTION OF THE TOWN OF MONTREAT AUTHORIZING THE ESTABLISHMENT OF A BROKERAGE ACCOUNT AND DESIGNATING AUTHORIZED OFFICIALS

WHEREAS, the Town of Montreat (the "Town") is a duly incorporated municipality organized and existing under the laws of the State of North Carolina; and

WHEREAS, the Town Council desires to establish a brokerage account for the purpose of accepting gifts of securities.; and

WHEREAS, establishing a brokerage account with Edward Jones Investments or another a qualified financial institution will provide the Town with a alternative vehicle to invest and manage certain public funds in a prudent and lawful manner; and

WHEREAS, all investments made through such brokerage account shall comply with applicable state law, local ordinances, and the Town's adopted investment policy (if any);

NOW, THEREFORE, BE IT RESOLVED by the Town Council of the Town of Montreat as follows:

Section 1. Authorization to Establish Account
The Town hereby authorizes the establishment of one or more brokerage accounts in the name of the Town with a reputable and properly registered brokerage firm or financial institution, as selected by the Town Manager or Finance Officer.

Section 2. Purpose of Account
The brokerage account shall be used solely for the investment and management of Town funds in accordance with applicable state law and the Town's investment policies. No funds shall be invested in instruments not authorized by law.

Section 3. Authorized Officials
The following officials are hereby authorized to act on behalf of the Town with respect to the brokerage account:

- Town Manager
- Finance Officer

Such officials are authorized to open, maintain, and close accounts; transfer funds; purchase and sell authorized investments; and execute all necessary

documents, subject to any limitations set forth in this Resolution or Town policy.

Section 4. Dual Authorization All transactions exceeding one thousand dollars ($1,000.00) shall require the approval or authorization of both the following two (2) authorized officials: the Town Manager and the Town Finance Officer,

Section 5. Compliance with Law and Policy
All investments shall be made in strict compliance with:
(a) Applicable state statutes governing municipal investments;
(b) The Town's investment policy, if adopted; and
(c) Any other applicable financial controls or auditing requirements.

Section 6. Reporting Requirements
The Finance Officer shall provide periodic reports to the Town Council, no less frequently than quarterly, detailing:

- Account balances
- Investment holdings
- Performance metrics
- Compliance with applicable policies

Section 7. Safekeeping and Custody
All securities shall be held in the Town's name by the brokerage firm or the Town Finance Officer, in accordance with applicable law.

Section 8. Effective Date
This Resolution shall take effect immediately upon its adoption.

ADOPTED this ___ day of June, 2026.

Mayor

ATTEST:

Town Clerk

CONTRACT TO AUDIT ACCOUNTS

The

Governing Board
Honorable Mayor and Members of the Board of Commissioners

of

Primary Government Unit
Town of Montrat, North Carolina

and

Discretely Presented Component Unit (DPCU) (if applicable)
na

Primary Government Unit, together with DPCU (if applicable), hereinafter referred to as Governmental Unit(s)

and

Auditor Name
Carter, P.C.

Auditor Address
301 College Street, Ste 320, Asheville NC, 28801

Hereinafter referred to as Auditor

for

Fiscal Year Ending	Date Audit Will Be Submitted to LGC
06/30/26	12/31/26

Must be within six months of FYE

hereby agree as follows:

1. The Auditor shall audit all statements and disclosures required by "U.S. Auditing Standards – AICPA (Clarified)," referred to as generally accepted auditing standards (GAAS) and additional required legal statements and disclosures of all funds and/or divisions of the Governmental Unit(s). The non-major combining, and individual fund statements and schedules shall be subjected to the auditing procedures applied in the audit of the basic financial statements and an opinion shall be rendered in relation to (as applicable) the governmental activities, the business-type activities, the aggregate DPCUs, each major governmental and enterprise fund, and the aggregate remaining fund information (non-major government and enterprise funds, the internal service fund type, and the fiduciary fund types). Budgetary comparison information shall be prepared in accordance with applicable GASB standards. Budget-to-actual comparisons at the level of the legally adopted budget ordinance shall be presented as required supplementary information and shall not be included in the basic financial statements. Any other budgetary comparison information shall be presented only as supplementary information for funds required to be budgeted under NCGS Chapter 159, Article 3.

2. At a minimum, the Auditor shall conduct the audit and render the report in accordance with GAAS. If the Governmental Unit expended $100,000 or more in combined Federal and State financial assistance during the reporting period, the Auditor shall perform the audit in accordance with *Generally Accepted Government Auditing Standards* (GAGAS). The Governmental Unit is subject to federal single audit requirements in accordance with Title 2 US Code of Federal Regulations Part 200 *Uniform Administration Requirements, Cost Principles, and Audit Requirements for Federal Awards*, Subpart F (*Uniform Guidance*) and the State Single Audit Implementation Act. Currently the threshold is $1,000,000 for federal and state single audits, or such other threshold as applicable for the fiscal year under audit. This audit and all associated audit documentation may be subject to review by federal and State agencies in accordance with federal and State laws, including the staff of the Office of State Auditor (OSA) and the Local Government Commission (LGC). If the audit requires a federal single audit in accordance with the Uniform Guidance (§200.501) the Auditor and Governmental Unit(s) should discuss, in advance of the execution of this contract, the responsibility for submission of the audit and the accompanying data collection form (form SF-FAC) to the Federal Audit Clearinghouse as required under the Uniform Guidance (§200.512) to ensure proper submission.

If the audit and Auditor communication are found in this review to be substandard, the results of the review may be forwarded to the North Carolina State Board of CPA Examiners (NC State Board).

3. If an entity is determined to be a component of another government as defined by the group audit standards, the entity's auditor shall make a good faith effort to comply in a timely manner with the requests of the group auditor in accordance with AU-6 §600.41 - §600.42.

4. This contract contemplates an unmodified opinion being rendered. If during the process of conducting the audit, the Auditor determines that it will not be possible to render an unmodified opinion on the financial statements of the unit, the Auditor shall contact the LGC Staff to discuss the circumstances leading to that conclusion as soon as is practical and before the final report is issued. The audit shall include such tests of the accounting records and such other auditing procedures as are considered by the Auditor to be necessary in the circumstances. Any limitations or restrictions in scope which would lead to a qualification should be fully explained in an attachment to this contract.

5. If this audit engagement is subject to the standards for audit as defined in *Government Auditing Standards* (2018 revision or subsequent revisions, as applicable) issued by the Comptroller General of the United States, then by accepting this engagement, the Auditor warrants that he or she has met the requirements for a peer review and continuing education as specified in *Government Auditing Standards*. The Auditor agrees to provide a copy of the most recent peer review report to the Governmental Unit(s) and to the Secretary of the LGC prior to the execution of an audit contract. Subsequent submissions of the report are required only upon report expiration or upon the Auditor's receipt of an updated peer review report. If the audit firm receives a peer review rating other than pass, the Auditor shall not contract with the Governmental Unit(s) without first contacting the Secretary of the LGC for a peer review analysis that may result in additional contractual requirements.

If the audit engagement is not subject to *Government Auditing Standards* or if financial statements are not prepared in accordance with U.S. generally accepted accounting principles (GAAP) and fail to include all disclosures required by GAAP, the Auditor shall provide an explanation as to why in an attachment to this contract or in an amendment.

6. It is agreed that time is of the essence in this contract. All audits are to be performed, and the report of audit submitted to LGC Staff, within six months of fiscal year end. At the time of the execution of this contract, if the parties know that the anticipated submission date of the audit exceeds six months after fiscal year end, a written explanation shall be provided to the Secretary of the LGC on this contract form (see the space provided on Page 7). If it becomes necessary to amend the audit fee or the date that the audit report will be submitted to the LGC, an amended contract along with a written explanation of the change shall be submitted to the Secretary of the LGC for approval.

7. It is agreed that GAAS include a review of the Governmental Unit's (Units') systems of internal control and accounting as they relate to accountability of funds and adherence to budget and law requirements applicable thereto; that the Auditor shall make a written report, which may or may not be a part of the written report of audit, to the Governing Board setting forth the Auditor's findings, together with his or her recommendations for improvement. That written report shall include all matters determined to be "significant deficiencies and material weaknesses" in accordance with AU-C §265 "Communicating Internal Control Related Matters Identified in an Audit" of GAAS. The Auditor shall file a copy of that report with the Secretary of the LGC.

For GAAS or *Government Auditing Standards* audits, if an Auditor issues an AU-C §260 report, "Auditor's Communication With Those Charged With Governance," commonly referred to as a "Governance Letter," LGC staff does not require the report to be submitted unless the Auditor cites significant findings or issues from the audit, as defined in AU-C §260 paragraphs 12 - 14. This would include issues such as difficulties encountered during the audit, significant or unusual transactions, uncorrected misstatements, matters that are difficult or contentious for which the Auditor consulted outside the engagement team and, in the Auditor's judgment, are significant and relevant to those charged with governance, and other findings or issues that the Auditor believes are significant and relevant. If matters identified during the audit were required to be reported as described in AU-C §260 paragraphs 12 - 14 and were communicated in a method other than an AU-C §260 letter, the written documentation must be submitted.

8. All local government and public authority contracts for audit or audit-related work require the approval of the Secretary of the LGC. This includes annual or special audits, agreed upon procedures related to internal controls, bookkeeping or other assistance necessary to prepare the Governmental Unit's records for audit, financial statement preparation, any finance-related investigations, or any other audit- related work in the State of North Carolina. Approval is also required for the Alternative Compliance Examination Engagement for auditing the Coronavirus State and Local Fiscal Recovery Funds expenditures as allowed by US Treasury. Approval is not required on audit contracts and invoices for system improvements and similar services of a non-auditing nature.

9. Invoices for services rendered under these contracts shall not be paid by the Governmental Unit(s) until the invoice has been approved by the Secretary of the LGC. This also includes any progress billings [G.S. 159-34 and 115C-447]. All invoices for audit work shall be submitted in PDF format to the Secretary of the LGC for approval. The invoice marked 'approved' with approval date shall be returned to the Auditor to present to the Governmental Unit(s) for payment. This paragraph is not applicable to contracts for audits of hospitals.

10. In consideration of the satisfactory performance of the provisions of this contract, the Governmental Unit(s) shall pay to the Auditor, upon approval by the Secretary of the LGC if required, the fee, which includes any costs the Auditor may incur from work paper or peer reviews or any other quality assurance program required by third parties (federal and state grantor and oversight agencies or other organizations) as required under the Federal Single Audit Act and the State Single Audit Act. This does not include fees for any pre-issuance reviews that may be required by the North Carolina Association of Certified Public Accountants (NCACPA) Peer Review Committee or North Carolina State Board of CPA Examiners (see Paragraph 13).

11. If the Governmental Unit(s) has/have outstanding revenue bonds, the Auditor shall submit to LGC Staff, either in the notes to the audited financial statements or as a separate report, a calculation demonstrating compliance with the revenue bond rate covenant. Additionally, the Auditor shall submit to LGC Staff simultaneously with the Governmental Unit's (Units') audited financial statements any other bond compliance statements or additional reports required by the authorizing bond documents, unless otherwise specified in the bond documents.

12. After completing the audit, the Auditor shall submit to the Governing Board a written report of audit. This report shall include, but not be limited to, the following information: (a) Management's Discussion and Analysis, (b) the financial statements and notes of the Governmental Unit(s) and all of its component units prepared in accordance with GAAP, (c) supplementary information requested by the Governmental Unit(s) or required for full disclosure under the law, and (d) the Auditor's opinion on the material presented. The Auditor shall furnish the required number of copies of the report of audit to the Governing Board upon completion.

13. If the audit firm is required by the Secretary of the Local Government Commission to obtain a pre-issuance review or take corrective action as a result of peer review findings or quality control deficiencies, such corrective action shall be consistent with the authority and requirements of the North Carolina State Board of Certified Public Accountant Examiners, the AICPA Peer Review Program, and established Local Government Commission practice, including the use of report addenda or other remedial measures, as appropriate.

14. In accordance with G.S. 159-34, the Finance Officer of the Unit is responsible for filing the audited financial statements with the Secretary of the Local Government Commission.

The Auditor may upload the audit report and related documents through the LGC's electronic submission system; however, submission shall not be deemed complete until the Finance Officer has reviewed and certified the submission.

The Auditor, Finance Officer, other Unit staff member designated by the Finance Officer, or a third party approved by the Unit may enter all Data Input Report information except the information on the "transmittal doc info" tab. The "transmittal doc info" tab must be completed by the Auditor.

The Finance Officer shall review, approve, and certify the accuracy and completeness of the Data Input Report (DIR) in the LGC's LOGOS system prior to LGC review, regardless of whether the DIR is prepared by the Auditor or the Unit.

Finance Officer certification is required for any corrected or revised submissions.

Finance Officer certification of the DIR shall be completed in a timely manner following notification that the DIR is ready for review and within time frames prescribed by the LGC. Failure to complete certification in a timely manner may result in the audit being considered late due to unit action rather than auditor performance

The Auditor shall conduct the audit in accordance with generally accepted auditing standards and shall ensure that the financial statements are prepared in accordance with generally accepted accounting principles as of the fiscal year end. Budget-to-actual comparisons at the level of the legally adopted budget ordinance shall be presented in required supplementary information, separate from the basic financial statements, and shall not be included in the audit opinion. The Auditor shall confirm that such information reconciles to the financial statements and is consistent with applicable accounting guidance and any LGC reporting requirements.

The Finance Officer shall certify in a timely manner that all data inputted in LOGOS used for preparation of the financial statements and required supplementary information is complete and accurate.

For audits of units other than hospitals, the audit report should be submitted when (or prior to) submitting the final invoice for services rendered. The report of audit, as filed with the Secretary of the LGC, becomes a matter of public record for inspection, review and copy in the offices of the LGC by any interested parties. Any subsequent revisions to these reports shall be sent to the Secretary of the LGC. These audited financial statements, excluding the Auditors' opinion, may be used in the preparation of official statements for debt offerings by municipal bond rating services to fulfill secondary market disclosure requirements of the Securities and Exchange Commission and for other lawful purposes of the Governmental Unit(s) without requiring consent of the Auditor. If the LGC Staff determines that corrections need to be made to the Governmental Unit's (Units') financial statements and/or the compliance section, those corrections shall be provided within three business days of notification unless another deadline is agreed to by LGC Staff.

15. Should circumstances disclosed by the audit call for a more detailed investigation by the Auditor than necessary under ordinary circumstances, the Auditor shall inform the Governing Board in writing of the need for such additional investigation and the additional compensation required therefore. Upon approval by the Secretary of the LGC, this contract may be modified or amended to include the increased time, compensation, or both as may be agreed upon by the Governing Board and the Auditor.

16. If an approved contract needs to be modified or amended for any reason, the change shall be made in writing and preaudited if the change includes a change in audit fee (preaudit requirement does not apply to hospitals). This amended contract shall be completed in full, including a written explanation of the change, signed and dated by all original parties to the contract. It shall then be submitted to the Secretary of the LGC for approval. No change to the audit contract shall be effective unless approved by the Secretary of the LGC.

17. A copy of the engagement letter, issued by the Auditor and signed by both the Auditor and the Governmental Unit(s), shall be attached to this contract, and except for fees, work, and terms not related to audit services, shall be incorporated by reference as if fully set forth herein as part of this contract. In case of conflict between the terms of the engagement letter and the terms of this contract, the terms of this contract shall take precedence. Engagement letter terms that conflict with the contract are deemed to be void unless the conflicting terms of this contract are specifically deleted in Paragraph 30 of this contract. Engagement letters containing indemnification clauses shall not be accepted by LGC Staff.

18. Special provisions should be limited. Please list any special provisions in an attachment.

19. A separate contract should not be made for each division to be audited or report to be submitted. If a DPCU is subject to the audit requirements detailed in The Local Government Budget and Fiscal Control Act and a separate audit report is issued, a separate audit contract is required. If a separate report is not to be issued and the DPCU is included in the primary government audit, the DPCU shall be named along with the primary government on this audit contract. DPCU Board approval date, signatures from the DPCU Board chairman and Finance Officer also shall be included on this contract.

20. The contract shall be executed, preaudited (preaudit requirement does not apply to hospitals) and physically signed by all parties including Governmental Unit(s) and the Auditor, then submitted in PDF format to the Secretary of the LGC.

21. The contract is not valid until it is approved by the Secretary of the LGC. The staff of the LGC shall notify the Governmental Unit and Auditor of contract approval by email. The audit should not be started before the contract is approved.

22. Retention of Client Records: Auditors are subject to the NC State Board of CPA Examiners' Retention of Client Records Rule 21 NCAC 08N .0305 as it relates to the provision of audit and other attest services, as well as non-attest services. Clients and former clients should be familiar with the requirements of this rule prior to requesting the return of records.

23. This contract may be terminated at any time by mutual consent and agreement of the Governmental Unit(s) and the Auditor, provided that (a) the consent to terminate is in writing and signed by both parties, (b) the parties have agreed on the fee amount which shall be paid to the Auditor (if applicable), and (c) no termination shall be effective until approved in writing by the Secretary of the LGC.

24. The Governmental Unit's (Units') failure or forbearance to enforce, or waiver of, any right or an event of breach or default on one occasion or instance shall not constitute the waiver of such right, breach or default on any subsequent occasion or instance.

25. There are no other agreements between the parties hereto and no other agreements relative hereto that shall be enforceable unless entered into in accordance with the procedure set out herein and approved by the Secretary of the LGC.

26. E-Verify. The Auditor shall comply with the requirements of NCGS Chapter 64 Article 2. Further, if the Auditor utilizes any subcontractor(s), Auditor shall require such subcontractor(s) to comply with the requirements of NCGS Chapter 64, Article 2.

27. For all non-attest services, the Auditor shall adhere to the independence rules of the AICPA Professional Code of Conduct and *Government Auditing Standards, 2018 or 2024 Revision* (as applicable). Preparing financial statements in their entirety shall be deemed a "significant threat" requiring the Auditor to apply safeguards sufficient to reduce the threat to an acceptable level. If the Auditor cannot reduce the threats to an acceptable level, the Auditor cannot complete the audit. If the Auditor is able to reduce the threats to an acceptable level, the documentation of this determination, including the safeguards applied, must be included in the audit workpapers.

All non-attest service(s) being performed by the Auditor that are necessary to perform the audit must be identified and included in this contract. The Governmental Unit shall designate an individual with the suitable skills, knowledge, and/or experience (SKE) necessary to oversee the services and accept responsibility for the results of the services performed. If the Auditor is able to identify an individual with the appropriate SKE, the Auditor must document and include in the audit workpapers how the Auditor reached that conclusion. If the Auditor determines that an individual with the appropriate SKE cannot be identified, the Auditor cannot perform both the non-attest service(s) and the audit. See "Fees for Audit Services" page of this contract to disclose the person identified as having the appropriate SKE for the Governmental Unit.

28. **Applicable to audits with fiscal year ends of June 30, 2021 and later.** The Auditor shall present the audited financial statements including any compliance reports to the Government Unit's Governing Board or audit committee in an official meeting in open session as soon as the audited financial statements are available but not later than 45 days after the submission of the audit report to the Secretary of the LGC. The Auditor's presentation to the Governing Board or audit committee shall include:

a) the description of each finding, including all material weaknesses and significant deficiencies, as found by the Auditor, and any other issues related to the internal controls or fiscal health of the Government Unit as disclosed in the management letter, the Single Audit or Yellow Book reports, or any other communications from the Auditor regarding internal controls as required by current auditing standards;

b) the status of the prior year audit findings;

c) the values of Financial Performance Indicators based on information presented in the audited financial statements; and

d) notification to the Governing Board that the Governing Board shall develop a "Response to the Auditor's Findings, Recommendations, and Fiscal Matters," if required under Rule 20 NCAC 03 .0508.

29. Information based on the audited financial statements shall be submitted to the Secretary of the LGC through the LGC's LOGOS system, including completion of the Data Input Report (DIR). Submission is not complete and shall not be accepted by the LGC until the Finance Officer has reviewed and certified the DIR in accordance with Paragraph 14 of this contract.

30. All of the above paragraphs are understood and shall apply to this contract, except the following numbered paragraphs shall be deleted (See Paragraph 17 for clarification).

31. The process for submitting contracts, audit reports and invoices is subject to change. Auditors and Units should use the submission process and instructions in effect at the time of submission. Refer to the N.C. Department of State Treasurer website at https://www.nctreasurer.com/state-and-local-government-finance-division/local-government-commission/submitting-your-audit.

32. All communications regarding audit contract requests for modification or official approvals will be sent to the email addresses provided on the signature pages that follow.

33. **Applicable to audits with fiscal year ends of June 30, 2025, and later.** The Unit authorizes the LGC to grant access to the LGC's LOGOS system, including the Data Input Report (DIR), to employees of the contracted audit firm who are associated with and acting on behalf of the firm for purposes of performing audit and reporting services under this contract. Such access shall be limited to the scope necessary to perform contracted services and shall not relieve the Auditor or the Unit of their respective responsibilities under this contract.

34. Changes or edits to the text of this contract form are not permitted, except for the Secretary's authority to revise or update this contract form pursuant to LGC Rule 20 NCAC 03. 0502.

For contracts with an anticipated audit submission date exceeding six months after fiscal year end, please use this space to explain the reason for the late submission, as required by Paragraph 6 of this contract form:

FEES FOR AUDIT SERVICES

1. For all non-attest services, the Auditor shall adhere to the independence rules of the AICPA Professional Code of Conduct (as applicable) and *Government Auditing Standards,2018 Revision*. Refer to Paragraph 27 of this contract for specific requirements. The following information must be provided by the Auditor; contracts presented to the LGC without this information will be not be approved.

Financial statements were prepared by: ☑ Auditor ☐ Governmental Unit ☐ Third Party

If applicable: The individual at the Governmental Unit designated to have the suitable skills, knowledge, and/or experience (SKE) necessary to oversee the non-attest services and accept responsibility for the results of these services:

Name:	*Title and Unit / Company:*	*Email Address:*
Rachel Eddings	Finance Officer	reddings@townofmontreat.org

OR Not Applicable ☐ *(Identification of SKE Individual on the LGC-205 Contract is not applicable for GAAS-only audits or audits with FYEs prior to June 30, 2020.)*

2. Fees may not be included in this contract for work performed on Annual Financial Information Reports (AFIRs), Form 990s, or other services not associated with audit fees and costs. Such fees may be included in the engagement letter but may not be included in this contract or in any invoices requiring approval of the LGC. See Paragraphs 8 and 13 for details on other allowable and excluded fees.

3. The audit fee information included in the table below for both the Primary Government Fees and the DPCU Fees (if applicable) should be reported as a specific dollar amount of audit fees for the year under this contract. If any language other than an amount is included here, the contract will be returned to the audit firm for correction.

4. Prior to the submission of the completed audited financial report and applicable compliance reports subject to this contract, or to an amendment to this contract (if required) the Auditor may submit interim invoices for approval for services rendered under this contract to the Secretary of the LGC, not to exceed 75% of the billings for the Unit's last annual audit that was submitted to the Secretary of the LGC. All invoices for services rendered in an audit engagement as defined in Rule 20 NCAC .0503 shall be submitted to the Secretary of the LGC for approval before any payment is made. Payment before approval is a violation of law. (This paragraph not applicable to contracts and invoices associated with audits of hospitals).

Primary Government Unit	Town of Montrat, North Carolina
Audit Fee (financial and compliance if applicable)	$ 32350
Fee per Major Program (if not included above)	$
Additional Fees Not Included Above (if applicable):	
Financial Statement Preparation (incl. notes and RSI)	$
All Other Non-Attest Services Out of Pocket Costs	$ 500
TOTAL AMOUNT NOT TO EXCEED	$ 32,850

Discretely Presented Component Unit	na
Audit Fee (financial and compliance if applicable)	$
Fee per Major Program (if not included above)	$
Additional Fees Not Included Above (if applicable):	
Financial Statement Preparation (incl. notes and RSI)	$
All Other Non-Attest Services	$
TOTAL AMOUNT NOT TO EXCEED	$

SIGNATURE PAGE

AUDIT FIRM

Audit Firm* Carter, P.C.	
Authorized Firm Representative (typed or printed)* Francine Noel	Signature*
Date* 05/01/26	Email Address* fran.noel@carter.cpa

GOVERNMENTAL UNIT

Governmental Unit* Town of Montrat, North Carolina	
Date Governing Board Approved Audit Contract* **(Enter date in box to right)**	
Mayor/Chairperson (typed or printed)*	Signature*
Date	Email Address*

Chair of Audit Committee (typed or printed, or "NA")	Signature
Date	Email Address

GOVERNMENTAL UNIT – PREAUDIT CERTIFICATE

Required by G.S. 159-28(a1) or G.S. 115C-441(a1). Not applicable to hospital contracts.

This instrument has been preaudited in the manner required by The Local Government Budget and Fiscal Control Act or by The School Budget and Fiscal Control Act.

Sum Obligated by This Transaction:	$ 32,850
Primary Governmental Unit Finance Officer* (typed or printed)	Signature*
Date of Preaudit Certificate*	Email Address*

SIGNATURE PAGE – DPCU
(complete only if applicable)

DISCRETELY PRESENTED COMPONENT UNIT

DPCU* na	
Date DPCU Governing Board Approved Audit Contract* **(Enter date in box to right)**	
DPCU Chairperson (typed or printed)*	Signature*
Date*	Email Address*

Chair of Audit Committee (typed or printed, or "NA")	Signature
Date	Email Address

DPCU – PREAUDIT CERTIFICATE

Required by G.S. 159-28(a1) or G.S. 115C-441(a1). Not applicable to hospital contracts.

This instrument has been preaudited in the manner required by The Local Government Budget and Fiscal Control Act or by The School Budget and Fiscal Control Act.

Sum Obligated by this Transaction:	$
DPCU Finance Officer (typed or printed)*	Signature*
Date of Preaudit Certificate*	Email Address*

Remember to print this form, and obtain all required signatures prior to submission.

PRINT

CARTER
ACCOUNTING • TAX • ASSURANCE

301 College St. Suite 320 | Asheville NC 28801 | 828.259.9900
2101 Rexford Rd. Suite 275-E | Charlotte NC 28211 | 704.676.6335
300 North Main St. Suite 203 | Greenville SC 29601 | 864.203.8781

May 1, 2026

To the Honorable Mayor and Members of the Board of Commissioners
Town of Montreat, North Carolina
Montreat, North Carolina

We are pleased to confirm our understanding of the services we are to provide Town of Montreat, North Carolina (the Town) for the year ending June 30, 2026.

Audit Scope and Objectives

We will audit the financial statements of the governmental activities, the business-type activities, each major fund, and the disclosures, which collectively comprise the basic financial statements of the Town as of and for the year ending June 30, 2026. Accounting standards generally accepted in the United States of America (GAAP) provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to supplement Town of Montreat's basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to Town of Montreat's RSI in accordance with auditing standards generally accepted in the United States of America (GAAS). These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance. The following RSI is required by GAAP and will be subjected to certain limited procedures, but will not be audited:

1. Management's Discussion and Analysis
2. Schedule of the Proportionate Share of the Net Pension Liability - Local Government Employees' Retirement System
3. Schedule of Contributions - Local Government Employees' Retirement System
4. Schedule of Changes in Total Pension Liability – Law Enforcement Officers' Special Separation Allowance
5. Schedule of Total Pension Liability as a Percentage of Covered Payroll - LEOSSA
6. General Fund - Budgetary Comparison Schedule - Budget and Actual

We have also been engaged to report on supplementary information other than RSI that accompanies Town of Montreat's financial statements. We will subject the following supplementary information to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with GAAS, and we will provide an opinion on it in relation to the financial statements as a whole in a report combined with our auditors' report on the financial statements:

1. Combining Balance Sheet for Non-major Governmental Funds
2. Combining Statement of Revenues, Expenditures, and Changes in Fund Balances - Non-major Governmental Funds
3. Landcare Special Revenue Fund - Schedule of Revenues, Expenditures, and Changes in Fund Balances - Budget and Actual
4. Miscellaneous Projects Special Revenue Fund - Schedule of Revenues, Expenditures, and Changes in Fund Balances - Budget and Actual
5. ARPA Special Revenue Fund - Schedule of Revenues, Expenditures, and Changes in Fund Balances - Budget and Actual
6. Enterprise Fund - Water Fund and Sewer Fund: Schedule of Revenues and Expenditures - Budget and Actual
7. Schedule of Ad Valorem Taxes Receivable
8. Analysis of Current Tax Levy

In connection with our audit of the basic financial statements, we will read the following other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report. The following information is not required supplementary information or supplementary information.

1. Transmittal Letter

The objectives of our audit are to obtain reasonable assurance as to whether the financial statements as a whole are free from material misstatement, whether due to fraud or error; issue an auditors' report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with GAAP; and report on the fairness of the supplementary information other than required supplementary information when considered in relation to the financial statements as a whole. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgement of a reasonable user made based on the financial statements.

The objectives also include reporting on internal control over financial reporting and compliance with provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards.*

Auditors' Responsibilities for the Audit of the Financial Statements

We will conduct our audit in accordance with GAAS and the standards for financial audits contained in *Government Auditing Standards,* issued by the Comptroller General of the United States; and will include tests of your accounting records of Town of Montreat, North Carolina and other procedures we consider necessary to enable us to express such opinions. As part of an audit in accordance with GAAS and *Government Auditing Standards,* we exercise professional judgement and maintain professional skepticism throughout the audit.

We will evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management. We will also evaluate the overall presentation of the financial statements, including the disclosures, and determine whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the government or to acts by management or employees acting on behalf of the government. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not expect auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is an unavoidable risk that some material misstatements may not be detected by us, even though the audit is properly planned and performed in accordance with GAAS and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management of any material errors, fraudulent financial reporting, or misappropriation of assets that comes to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

In connection with this engagement, we may communicate with you or others via email transmission. As emails can be intercepted and read. disclosed, or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant that emails from us will be properly delivered and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of emails transmitted by us in connection with the performance of this engagement. In that regard, you agree that we shall have no liability for any loss or damage to any person or entity resulting from the use of email transmissions, including any consequential, incidental, direct, indirect, or special damages such as loss of revenues or anticipated profits, or disclosure or communication of confidential or proprietary information.

We will also conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the government's ability to continue as a going concern for a reasonable period of time.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of inventories, and direct confirmation of receivables and certain assets and liabilities by correspondence with selected customers, creditors, and financial institutions. We will also request written representations from your attorneys as part of the engagement and they may bill you for responding to this inquiry.

According to GAAS, significant risks include management override of controls, and GAAS presumes that revenue recognition is a significant risk. Accordingly, we have considered these as significant risks. We identified the following additional significant risks of material misstatement as part of our audit planning:

- Proper recording of grant revenue and expenditures

Planning for the current year engagement has not concluded and additional risks could be identified.

We may from time to time and depending on the circumstances, use third-party service providers in serving your account. We may share confidential information about you with these service providers, but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures, and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, we will remain responsible for the work provided by any such third-party service providers.

Our audit of the financial statements does not relieve you of your responsibilities.

Audit Procedures - Internal Control

We will obtain an understanding of the government and its environment, including the system of internal control, sufficient to identify and assess the risks of material misstatement of the financial statements, whether due to error or fraud, and to design and perform audit procedures responsive to those risks and obtain evidence that is sufficient and appropriate to provide a basis for our opinions. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards.* The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentation, or the override of internal control. An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. Accordingly, we will express no such opinion. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, and *Government Auditing Standards.*

Audit Procedures – Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of Town of Montreat's compliance with the provisions of applicable laws, regulations, contracts, agreements, and grants. However, the objective of our audit will not be to provide an opinion on overall compliance, and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

Responsibilities of Management for the Financial Statements

Our audit will be conducted on the basis that you acknowledge and understand your responsibility for designing, implementing, establishing, and maintaining effective internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, and for evaluating and monitoring ongoing activities to help ensure that appropriate goals and objectives are met, following laws, and regulations; and ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts and grant agreements. You are also responsible for the selection and application of accounting principles; and for the preparation and fair presentation of the financial statements and all accompanying information in conformity with accounting principles generally accepted in the United States of America , and for compliance with applicable laws and regulations and the provisions of contracts and grant agreements.

Management is responsible for making drafts of financial statements, all financial records, and related information available to us; for the accuracy and completeness of that information (including information from outside of the general and subsidiary ledgers); and for the evaluation of whether there are any conditions or events, considered in the aggregate, that raise substantial doubt about the government's ability to continue as a going concern for the 12 months after the financial statement date or shortly thereafter (for example, within an additional three months if currently known). You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters; (2) additional information that we may request for the purpose of the audit; and (3) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements, compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by GAAS and *Government Auditing Standards*.

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements of each opinion unit taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants and for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, or contracts or grant agreements that we report.

You are responsible for the preparation of the supplementary information, which we have been engaged to report on, in conformity with accounting principles generally accepted in the United States of America (GAAP). You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the Audited financial statements with any presentation of the supplementary information that includes our report thereon OR make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

With regard to publishing the financial statements on your website, you understand that websites are a means of distributing information and, therefore, we are not required to read the information contained in those sites or to consider the consistency of other information on the website with the original document.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits or other studies related to the objectives discussed in the Audit Scope and Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions, for the report, and for the timing and format for providing that information.

Other Services

We will also assist in preparing the financial statements and related notes, of Town of Montreat, North Carolina in conformity with accounting principles generally accepted in the United States of America based on information provided by you. In addition, we will maintain your property and equipment listing, based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We will perform the services in accordance with applicable professional standards. The other services are limited to the financial statement services and maintenance of your property and equipment listing previously defined. We, in our sole professional judgement, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

You agree to assume all management responsibilities relating to the financial statements and related notes, maintenance of your property and equipment listing, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with the preparation of the financial statements and related notes, maintenance of your property and equipment listing, and that you have reviewed and approved the financial statements and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Engagement Administration, Fees, and Other

We will schedule the engagement based in part on deadlines, working conditions, and the availability of your key personnel. We will plan the engagement based on the assumption that your personnel will cooperate and provide assistance by performing tasks such as preparing requested schedules, retrieving supporting documents, and preparing confirmations. If, for whatever reason, your personnel are unavailable to provide the necessary assistance in a timely manner, it may substantially increase the work we have to do to complete the engagement within the established deadlines, resulting in an increase in fees over our original fee estimate.

We will provide copies of our reports to the North Carolina Local Government Commission; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of Carter, P.C. and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the North Carolina Local Government Commission or its designee. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Carter, P.C. personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by the cognizant agency, oversight agency, or pass-through entity. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Francine R. Noel, CPA is the audit managing director and is responsible for supervising the engagement and signing the reports. We expect to begin our audit in July 2026 and to issue our reports no later than December 31, 2026.

To ensure that Carter, P.C.'s independence is not impaired under the AICPA *Code of Professional Conduct*, you agree to inform the engagement director before entering into any substantive employment discussions with any of our personnel.

We estimate our fees for the audit and other services will approximate $32,350. You will also be billed for travel and other out-of-pocket costs such as mileage, report production, postage, travel, copies, etc. Out-of-pocket expenses will not exceed $500. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will keep you informed of any problems we encounter, and our fees will be adjusted accordingly. Our invoices for these fees will be rendered as work progresses and are payable on presentation.

In accordance with our firm policies, work may be suspended if your account becomes 45 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed even if we have not completed our report. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination.

You may request that we perform additional services not addressed in this engagement letter. If this occurs, we will communicate with you concerning the scope of the additional services and the estimated fees. We also may issue a separate engagement letter covering the additional services. In the absence of any other written communication from us documenting such additional services, our services will continue to be governed by the terms of this engagement letter.

Carter, P.C. does not host any of Town of Montreat's information. Liscio, our client portal system, is used solely to transmit data and is not intended to store Town of Montreat's information. Town of Montreat is solely responsible for downloading any deliverables and other records from Liscio that the Town wishes to retain for its own records at the completion of the engagement.

The data and deliverables and other records will either be removed from Liscio or otherwise become unavailable to Town of Montreat after 60 days of report issuance.

Reporting

We will issue a written report upon completion of our audit of Town of Montreat's financial statements. Our report will be addressed to the Honorable Mayor and Members of the Board of Aldermen of Town of Montreat. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinions, add a separate section, or add an emphasis-of matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from this engagement. If our opinions are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or issue reports, or we may withdraw from this engagement.

We will also provide a report (that does not include an opinion) on internal control related to the financial statements and compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements as required by *Government Auditing Standards*. The report on internal control and on compliance and other matters will state (1) that the purpose of the report is solely to describe the scope of testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The report will also state that the report is not suitable for any other purpose. If during our audit we become aware that Town of Montreat is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit in accordance with U.S. generally accepted auditing standards and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

We appreciate the opportunity to be of service to Town of Montreat and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign below and return it to us.

Very truly yours,

CARTER, P.C.

Carter, P.C.

This letter correctly sets forth the understanding of the Town of Montreat.

Management signature _____

Title _____

Governance signature _____

Title _____

CONSOLIDATED WASTE SERVICES

Request for Proposal

Town of Montreat, NC

Residential Waste and Recyclable Material Collection and Disposal Services

RFPID: A051126.01

May 11, 2026









CONSOLIDATED WASTE SERVICES

696 Riverside Drive
Asheville, NC 28801
Main: (828) 645-0660
www.ConsolidatedWasteServices.com

Proposal Contents

Update Fields

Section	Item
1	Cover Letter
2	Company Profile and Experience
3	Personnel Qualifications
4	Equipment Listing
5	Technical Approach (Execution Plan)
6	Public Education Support Plan (Example)
7	Proof of Insurance
8	Professional References
9	CWS Safety Rules

Section 1 - Cover Letter









CWS
CONSOLIDATED WASTE SERVICES

May 11, 2026

Barry Creasman
Public Works Director
Town of Montreat, NC

Reference: Residential Waste and Recyclable Material Collection and Disposal Services

Dear Mr. Creasman,
Consolidated Waste Services is pleased to submit this proposal which includes all the labor and equipment required to complete the work as described in your Request For Proposal. This proposal is valid for 30 days.

Schedule:

- Schedule to be submitted and accepted by the Town of Montreat prior to contract execution
- Workday Exceptions
  - New Years Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day, (Landfill Closures)

Clarifications:

- Fluctuations in the number of active participants (households) may affect the billing/contract value.
- Proposal assumes a contract term of no less than 5 years (with option for renewal)
- Proposal assumes that all the Town of Montreat participants will utilize 65-gallon rolling carts (or similar) for acceptable single stream recycling – curbside pickup.
- Proposal assumes that solid waste will only be collected from participants utilizing only rigid waste containers (32-gallon max) or plastic bags appropriated tied off not exceeding 35 lbs. in weight – curbside pickup.
- Route adjustment or the addition of services dictated by the Town of Montreat may be additional cost and will be discussed with the appropriate Montreat representatives prior to execution of work.

Pricing:

Lump Sum Total Per Household:

	1st Year	2nd Year	3rd Year	4th Year	5th Year
Trash	$12.45	$12.45	$13.07	$13.72	$13.72
Recycle	$3.03	$3.03	$3.18	$3.34	$3.34

Exclusions:

- Backdoor service has not been included as the Town of Montreat did not provide details regarding the number of current backdoor service customers.
- “Bear-resistant container program support” has not been included in this proposal as it has not been defined within the RFP documents.
- Proposal does not include a Lump Sum pricing for the disposal of solid waste and recycling. Waste disposal at the county “Buncombe County Landfill” will be paid by the Town of Montreat. Fines or charges for contaminated loads will be billed back to the Town of Montreat (Curbside Management or Buncombe County).
- Special Events or Service Adjustments

We appreciate the opportunity to submit pricing for the disposal of residential solid waste and recycling materials. The Consolidated Waste Services team looks forward to working with you and the residents of the Town of Montreat, NC.

Sincerely,
Morgan Alexander
Vice President

Section 2 - Company Profile and Experience







CONSOLIDATED WASTE SERVICES

Western North Carolina's Trusted Industrial Waste Management Service

Consolidated Waste Services is the trusted provider for affordable and effective residential, industrial and commercial waste removal and disposal for multiple Counties and Municipalities in Western North Carolina.

With over 50 years of combined experience in innovative and sustainable waste management solutions, Consolidated Waste Services will ensure that your trash and recycling removal and disposal are completed with professionalism and reliability.

Scott Welch, Founder and President

Scott launched Consolidated Waste Services in 2003 with nothing more than a truck, a container, and himself. Utilizing the skills and knowledge he has developed over his 22 years of experience in the industry, Scott has grown the CWS business into the multi-million-dollar company that it is today, providing services in seven of the Western North Carolina mountain counties.

Today, Scott is in charge of the day-to-day business development activities, aiming to further increase the capabilities, service area, and overall growth of Consolidated Waste Services. Building the business on the cornerstone of providing excellent services as efficiently as possible is why CWS is the preferred choice for industrial and residential waste management services.

Morgan Alexander, Vice President

Post graduation from Appalachian State University Morgan has been involved in all aspects of the industry, ranging from recycling and disposal of solid waste, the collection process and the operation of Material Recovery Facilities.

Morgan focuses on developing and delivering service solutions, providing outstanding client service, and driving effective growth for the Consolidated Waste Services business.

Robert M. Pettus, Operations

A graduate of Appalachian State University, Robert has nearly 20 years of experience managing and constructing large scale capital oil and gas projects in Texas, North Dakota, Wyoming and the Southeastern United States. Robert joined the Consolidated Waste Services team in 2024 where he utilizes his field experience to assist Scott and Morgan with day to day operational business continuity.

Robert is responsible for the management and maintenance of the CWS truck fleet as well as ensuring that CWS provides best in class waste management solutions for our partners and customers.

Section 3 - Personnel Qualifications









CWS
CONSOLIDATED WASTE SERVICES

Curtis Ray Mason (Residential Lead/Driver)

Consolidated Waste Services **2022-Current**

- Residential Lead Driver ensuring that the residential teams have what is required of them in order to complete collection, disposal and safe driving in accordance with CWS requirements and guidelines.
    - Review residential routes for assigned customers to ensure efficiency
    - Work with municipalities to ensure all collections are made appropriately (permanent and seasonal occupancy)
    - "Fill-in" driver when needed to ensure continuity of service
- Roll-Off and Hook Lift Driver
    - When assigned deliver, pick-up, swap and dispose of waste using 40yrd, 30yrd and 20yrd dumpsters using roll-off trucks as well as 10yrd and 17yrd hook lift dumpsters.

Dragontoe Transport **2021-2022**

- Owner/Operator of tow trucks, cable trucks and rollbacks

Carter Septic Tank **2021-2022**

- Driver/Technician of pump trucks
- Septic Tank Cleaner

Section 4 - Equipment Listing





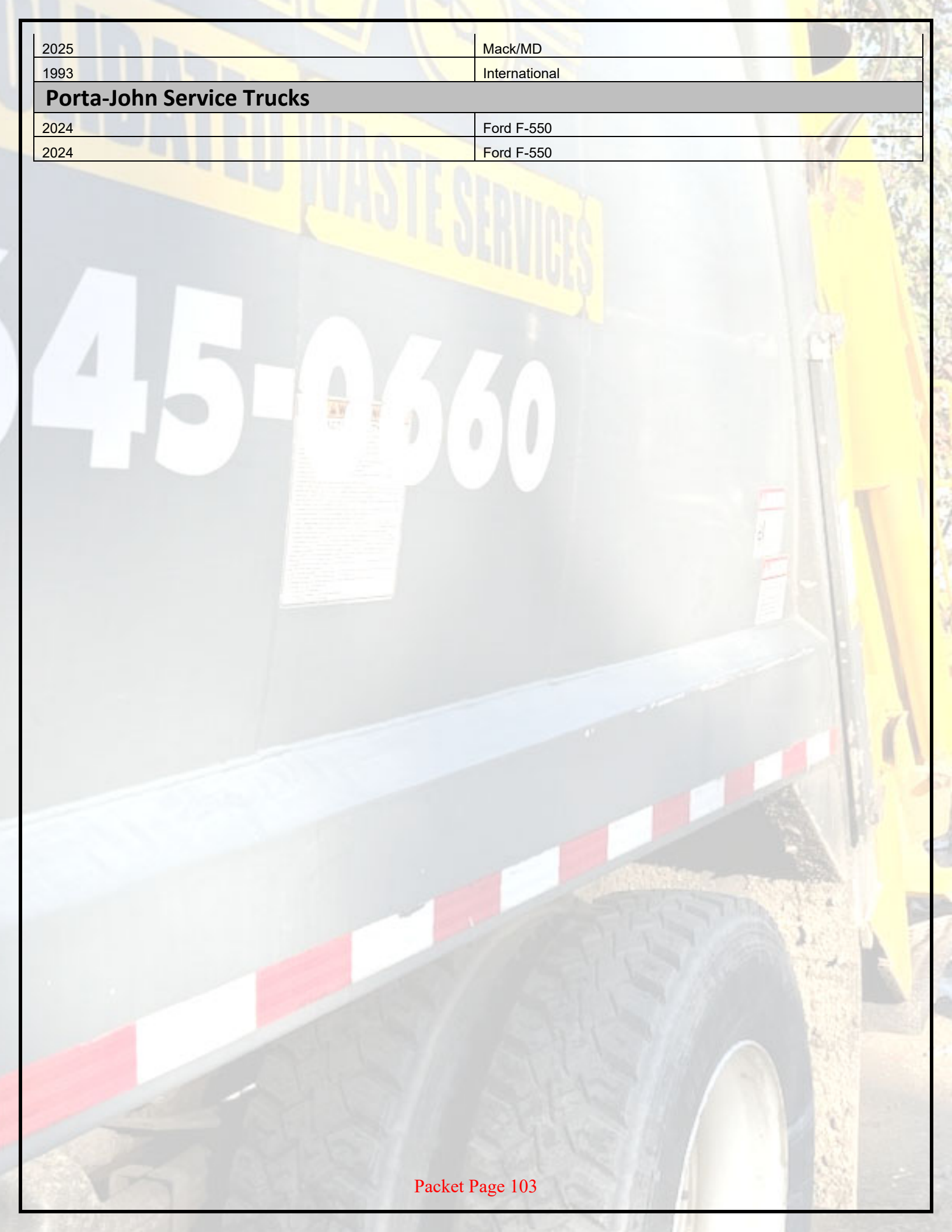




CWS
CONSOLIDATED WASTE SERVICES

Roll-Off Trucks	
Year	**Make/Model**
2005	Mack w/Hoist CV713
2012	Western Star
2015	Freightliner
2015	Mack GU713
2016	Mack GU713
2016	Freightliner
2017	Freightliner
2019	Freightliner
2023	Mack
2024	Mack GR64F
2024	Mack GR64F
2015	Mack GU713
2025	Peterbilt 567
2020	Freightliner
2022	Freightliner
2025	Peterbilt 567
Tractor Trucks	
2007	Sterling
2011	Mack
2012	Freightliner
2012	Freightliner
2014	Freightliner
2012	Freightliner
2016	Mack CXU613
2016	Mack CHU613
2013	Peterbilt
Hook Lift Trucks	
2008	KenworthT300
2015	Freightliner
2017	Freightliner-M2-106
2019	Ford F-550
Front Loader Trucks	
2005	Mack600
2013	Mack600
2020	Mack TE 64
2012	Mack
Residential Trucks (Rear Load w/ Tippers)	
2007	Freightliner M2 106
2016	Freightliner M2 106
2021	Freightliner M2 106
2024	Mack
Dumpster Delivery Trucks	
2006	Ford

2025	Mack/MD
1993	International
Porta-John Service Trucks	
2024	Ford F-550
2024	Ford F-550



Section 5 - Technical Approach (Execution Plan)









CWS
CONSOLIDATED WASTE SERVICES

Town of Montreat, NC Residential Waste and Recyclable Material Collection and Disposal Service

Technical Approach (Project Execution Plan)

5/11/2026

Revision Date	Rev	Description of Change	Approved By
5/11/2026	0	Initial Issue	Robert M. Pettus

1.0 PURPOSE

The purpose of this execution plan is to propose procedures and standards for collection of residential waste, recyclable material and cardboard from the residents of the Town of Montreat, NC for disposal in accordance with applicable permits, procedures and contract agreements. The objective of the execution plan are as follows:

- Establish Processes, Procedures, Schedule and Responsibilities for key stakeholders.
- Develop Communication Plan
- Outline identified Safety Risks with Mitigative Measures

2.0 CONTRACTOR EXPERIENCE

Consolidated Waste Services (CWS) specializes in providing timely waste management services for residential and commercial clients. CWS safely and efficiently provides solutions while maintaining a second-to-none reputation as a trusted partner for our customers, sub-contractors and vendors. Drawing on the experience of our managers and drivers, CWS has established itself as the Contractor Partner of choice for several municipalities in Western North Carolina.

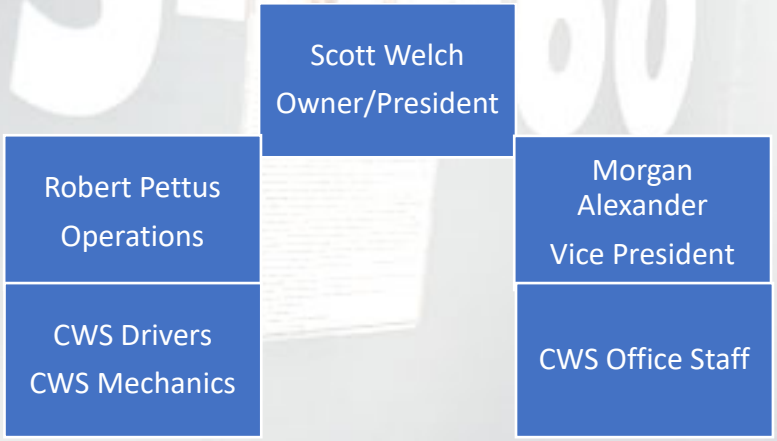
3.0 PROJECT WORK SCHEDULE

CWS will execute waste and recycling service as agreed upon and accepted by both CWS and the Town of Montreat, NC representatives.

3.1 Schedule Deviation and Notification

CWS works daily to mitigate any factors that may require schedule deviation. In order to ensure that CWS is providing the best service possible to its customers and clients, CWS maintains all equipment in accordance with manufacturer recommendations and settings. In the event that severe weather affects CWS's ability to service the residents of Montreat, NC, CWS will immediately notify Montreat representatives and develop a strategy and scheduling pickup.

4.0 ORGANIZATIONAL CHART



5.0 WORK PLAN

As with current CWS municipal customers, CWS will plan to deploy the residential team from the Corporate Office location on Riverside Drive in Asheville, NC. On assigned days, the CWS residential services team will pick up and dispose of the Town of Montreat waste and recycling in accordance with applicable permits, plans and contract documents. The typical truck crew "mix" will consist of licensed driver and (1) waste "slingers". The driver's primary focus is route adherence, schedule management and the safety of the CWS crew, equipment as well as the affected public.

CWS will utilize its existing fleet of residential trucks in order to service the Town of Montreat residents.

Truck Number	Year	Make/Model	Status
03-33	2016	Freightliner M2 106	Primary Service
03-44	2021	Freightliner M2 106	Primary Service
03-60	2024	Mack	Primary Service
03-21	2007	Freightliner M2 106	Backup Truck

****CWS is currently forecasting the procurement of an additional residential truck in 2026/2027****

After pickup of solid waste and recyclable material from applicable residents, CWS will dispose of the waste as appropriate at the disposal facility. CWS drivers will retain the scale tickets in order for CWS AP representatives to accurately complete billing

as needed. The CWS drivers, just as with the waste, will retain the scale tickets in order for CWS representatives to complete monthly billing.

6.0 COST MANAGEMENT

CWS bills their municipal partners monthly for the services provided. In order to ensure timely and accurate billing, CWS will work with the Town of Montreat representatives for the assurance that the appropriate household count is being billed. Invoices will be sent monthly with appropriate breakdown of number of households as well as tonnage amount. Scale House tickets will be provided for backup data with each billing.

7.0 PROJECT REPORTING

CWS will supply the Town of Montreat with accurate reporting quarterly. Each report will be supplied to the Town of Montreat no later than the 15th of the preceding month and shall detail solid waste tonnage, recyclable tonnage and the number of contamination tags that have been issued.

8.0 QUALITY MANAGEMENT

CWS takes pride in the assurance that waste and recycling is being picked up and disposed of appropriately and in a timely manner. CWS employs local drivers that are vested in the wellbeing of the local communities. CWS has also employed "backup" drivers capable of operating multiple pieces of equipment to ensure that there are no service gaps due to manpower constraint. In addition, CWS has employed (4) full-time mechanics to manage mechanical failures that may occur due to normal wear and tear and the need to operate at higher elevations for customers. CWS typically utilizes (2) residential trucks for existing customers' workload while maintaining (2) additional trucks as backup in the event there are mechanical issues that may require prolonged downtime. The CWS team also utilizes daily reporting from the crews' detailing residences that do not have receptacles or trash/recycling out at the time of pickup as well as utilization of the town approved "Oops" tags. In the event that the Town of Montreat representatives receive feedback about a missed stop or any other service concern, CWS will directly work with the team to ensure timely resolution – within 24hrs as outlined in the RFP.

9.0 COMMUNICATIONS PLAN

Description	Purpose	Attendees	Frequency
General Status Update	Review current status of project, highlight any issues or concerns and identify/assign required corrective actions	Representatives of the Town of Montreat, Robert Pettus and Morgan Alexander	Quarterly (Issue requiring immediate attention will be discussed ASAP)
Project Reporting	Provide solid waste tonnage, recyclable material tonnage and the contamination tags issued.	Representatives of the Town of Montreat, Robert Pettus and Morgan Alexander	Quarterly (no later than the 15th of the preceding month)
Cost/Billing	Questions regarding billing or potential cost forecast	Representatives of the Town of Montreat, Robert Pettus, Morgan Alexander, CWS AP Rep.	As-Needed (Via Phone or Email)

Annual Project Review Meeting	Report high level status of project, highlighting any issues or concerns	CWS and Town of Montreat representatives	Annually

Section 6 - Public Education Support Plan (Example)









CWS
CONSOLIDATED WASTE SERVICES

DON'T TANGLE OR CONTAMINATE

RECYCLE MORE

FOR A GREENER STATE



PLASTIC

Bottles, tubs, jugs and jars



Empty and rinse

METAL

All cans



Empty and rinse

GLASS

Bottles and jars



Empty and rinse

PAPER

Paper, cartons and cardboard



Flatten cardboard

WHEN IN DOUBT, THROW IT OUT!

Section 7 - Proof of Insurance









CWS
CONSOLIDATED WASTE SERVICES

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 6/24/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Howard W. Phillips & Company
80 M Street, SE Suite 350
Washington DC 20003

CONTACT NAME: Sarah Ahmed
PHONE (A/C, No, Ext): 202-351-0256 **FAX (A/C, No):** 202-331-8452
E-MAIL ADDRESS: certificates@hwphillips.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Erie Insurance Company	26263
INSURER B : Erie Insurance Exchange	26271
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED CONSWAS-02
Consolidated Waste Services, LLC
Consolidated Waste Services of Haywood County, Inc.
61 Azalea Drive
Weaverville NC 28787

COVERAGES **CERTIFICATE NUMBER:** 40480949 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY			Q61-0253573	2/1/2025	2/1/2026	EACH OCCURRENCE	$ 1,000,000
	[ ] [ ] CLAIMS-MADE [X] OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 1,000,000
							MED EXP (Any one person)	$ 5,000
							PERSONAL & ADV INJURY	$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 2,000,000
	X POLICY [ ] PRO-JECT [ ] LOC						PRODUCTS - COMP/OP AGG	$ 2,000,000
	[ ] OTHER:							$
B	AUTOMOBILE LIABILITY			Q02-0140591	2/1/2025	2/1/2026	COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
	[ ] ANY AUTO						BODILY INJURY (Per person)	$
	[ ] OWNED AUTOS ONLY [X] SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	[ ] UMBRELLA LIAB [ ] OCCUR						EACH OCCURRENCE	$
	[ ] EXCESS LIAB [ ] CLAIMS-MADE						AGGREGATE	$
	[ ] DED [ ] RETENTION $							$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N						[ ] PER STATUTE [ ] OTH-ER	
	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [ ] N / A						E.L. EACH ACCIDENT	$
	(Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$
							E.L. DISEASE - POLICY LIMIT	$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
THIS CERTIFICATE OF INSURANCE REFLECTS THE COVERAGE CURRENTLY IN EFFECT AND MAY NOT MEET ANY SPECIFIC CONTRACT REQUIREMENTS. PLEASE REFER TO THE POLICY DOCUMENTS FOR DETAILS ON ADDITIONAL INSURED, PRIMARY & NON-CONTRIBUTORY, WAIVER OF SUBROGATION, AND NOTICE OF CANCELLATION PROVISIONS THAT MAY APPLY. ANY JOB OR EVENT NUMBER, NAME, OR DESCRIPTION LISTED IS FOR REFERENCE PURPOSES ONLY AND DOES NOT IMPLY COVERAGE UNDER THE POLICIES. IT IS THE RESPONSIBILITY OF THE CERTIFICATE HOLDER TO VERIFY THAT THE COVERAGE MEETS THEIR REQUIREMENTS

Section 8 - Professional References









CWS
CONSOLIDATED WASTE SERVICES

Professional References

Vickie Best

Maggie Valley Town Manager

828-926-0866

vbest@maggievalleync.com

Pam James

Lake Junaluska Office Manager

828-452-5911

pjames@lakejunaluska.com

Kris Boyd

Deputy County Manager, Haywood County

828-452-6650

kris.boyd@haywoodcountync.com

Lynn Austin

County Manager, Yancey County

828-682-3971

lynn.austin@yanceycountync.com

Section 9 - CWS Safety Rules









CWS
CONSOLIDATED WASTE SERVICES

CONSOLIDATED WASTE SERVICES

SAFETY RULES

General

1. All accidents, injuries and near misses must be reported to your supervisor, immediately.
2. Immediately correct, or report any unsafe acts or conditions to your Supervisor, and warn any employees who may become involved.
3. If you have any doubt regarding the safety of a job procedure, consult with your immediate supervisor before proceeding with the task.
4. If an item of protective equipment is required by the job-site, or for the job you are doing, (i.e. hard hat, hearing protection, safety glasses, gloves, respirator, fall protection, lifejackets) consider the use of that equipment as a condition of employment. The minimum clothing and personal protective equipment that is required is:
    a. Steel-toed safety footwear with above the ankle support (CWS approved),
    b. Hi-visibility vest (CWS approved),
    c. Short-sleeved shirt (summer), long pants.
    d. Hard hats (if required)
5. Inspect tools and equipment daily, ensure all guards and safety devices are in place and functional. Misuse or willful damage of company tools and equipment is strictly prohibited.
6. Maintain good housekeeping in the workplace. Do not allow materials to gather on floors, platforms, ramps, stairs or walkways as to become a tripping hazard.
7. Hazardous materials must be identified, stored and handled in accordance with the Workplace Hazardous Materials Information System (WHMIS) regulations.
8. Never work alone in isolated areas unless arrangements have been made for periodic checks with another person.
9. Fighting, scuffling, horseplay, practical jokes and theft are prohibited.
10. The use of alcoholic beverages and drugs (including prescription or over the counter medications which may cause impairment) is strictly forbidden on the job or job-site. No person shall enter a job site while his or her ability to work is impaired.
11. Smoking in non-smoking areas (offices, plant offices, flammable areas, particular job locations) is strictly forbidden.
12. No worker shall ride on the outside of equipment unless the vehicle has been designed or modified for this purpose. All workers are to ride in the cabs of vehicles.
13. Seatbelts must be worn when operating equipped machinery, and company vehicles.
14. Never do maintenance or work under, on, or around a piece of running equipment. Shut it off and lock it out until your work is completed.
15. No worker shall operate damaged tools, equipment or machinery. If it is not operating correctly, or needs maintenance, “tag it” out of service, fill out an equipment repair form, and return it to the Operations Manager.
16. No worker shall operate or use any equipment in a manner that endangers themselves or other workers. Only persons properly trained and authorized by their Supervisor shall operate any equipment or machinery.
17. Comply with the requirements of the Safety Program and other applicable regulations.

Failure to comply with these rules will result in disciplinary action up to and including termination.

PROPOSAL FOR MUNICIPAL SOLID WASTE & RECYCLING COLLECTION

To: Savannah Parrish, Town Manager, Town of Montreat

From: Michael Parrott, Owner, Midsouth USA, INC.

Date: May 10, 2026

---

1. Introduction & Company Overview

Midsouth USA, INC. is a family-owned firm specializing in high-touch municipal and residential sanitation services tailored for the unique landscapes of Western North Carolina and North Georgia. My family has a deep personal connection to the Town of Montreat; my father, Gregg Parrott, has spent years maintaining the athletic courts for Montreat College and local schools. We view this proposal as a commitment to a long-term partnership dedicated to preserving the "community character" and "environmental stewardship" of the Town.

2. Mountain Terrain Expertise & Safety

Montreat's 15-mile road network is characterized by narrow, steep, and winding roads that require specialized equipment and expertise.

- **Regional Experience:** We currently operate in several mountainous counties, including Haywood, Jackson, Clay, Swain, and McDowell in NC.
- **Specialized Fleet (Satellite Model):** To protect Montreat's roads from the damage caused by heavy-class vehicles, we utilize a **Satellite-to-Mother-Ship** transfer model. We use maneuverable satellite units designed for the 18-mile route navigation, which then consolidate waste into a larger Mother Ship unit at the Town lot. This drastically reduces heavy truck passes over Town infrastructure.
- **Safety Training:** Safety is our priority. Our seasoned drivers spend an entire month in the truck with new hires to ensure total mastery of mountain-driving techniques and strict adherence to safety procedures.

3. Operational Plan & Staffing

Our service approach ensures zero disruption for residents while meeting the manual demands of backdoor collection.

- **Service Schedule:** We will maintain the **Monday** collection schedule for both solid waste and recycling.
- **Two-Man Professional Crew:** Each route will be serviced by a two-man team (Driver and Sanitation Technician) to safely perform backdoor collection and handle containers permanently affixed to the ground.
- **Material Consolidation & Infrastructure Utilization:** * **Solid Waste:** Collected weekly; satellite-dumped into our Mother Ship unit at the Town lot; and transferred to the Buncombe County Transfer Station.
    - **Recycling:** Collected bi-weekly (every other week) and hand-unloaded by our crew directly into the Town's stationary compactors. This collaborative use of resources reduces mileage traveled to the Curbie Recycling Facility, and minimizes cost for The Town of Montreat residents.
- **Management Backup:** Our Regional Manager, Dale Goff, and Area Manager, Andrew Reel, are both fully trained to man the truck to ensure service continuity in any emergency.

4. Customer Service & Reliability

The Town expects the highest level of service, and we provide multiple layers of communication redundancy:

- **Direct Support:** Dispatcher Grace Autry is available from 8:00 AM – 5:00 PM for immediate recovery of any missed stops.
- **Rapid Response:** Area Manager Andrew Reel is based in Marion, NC, providing proximity for on-site audits and issues.
- **Owner Accountability:** I am directly available to the Town Manager for regular coordination.

5. Weather Policy & Service Continuity

The unique infrastructure of Montreat requires a safety-first approach during weather events to avoid property damage.

- **Standard Recovery:** We aim to recover all missed stops within **24 hours** in the event of a standard missed stop. Following typical winter weather or heavy rain, up to **48 hours** should be allowed to ensure safety of residents, as well as our drivers.
- **Catastrophic Event Clause:** Following events like Hurricane Helene, we reserve the right to request additional time to ensure the safety of our drivers and prevent damage to saturated or unstable mountain grades.
- **Infrastructure Protection:** Operating heavy equipment on ice-slicked or unstable roads risks blocking access for emergency services on Montreat's single-access corridors. We will always prioritize the safety of the Town's infrastructure.

6. Pricing Structure

Midsouth proposes a comprehensive service rate that accounts for the intensive manual labor and specialized equipment required for Montreat.

Total Monthly Rate: $15.00 per household

To provide transparency regarding our resource allocation, the rate is split as follows:

- **Weekly Municipal Solid Waste (MSW) Collection: $12.00** *This covers all costs associated with weekly collection, including fuel, labor, truck maintenance, etcetera; specialized satellite equipment & maintenance; time and labor associated with the satellite transfer process; and costs associated with the transportation of the waste to the Buncombe County Transfer Station.*
- **Bi-Weekly Recycling Collection: $3.00** *This covers all costs associated with bi-weekly collection, including fuel, labor, truck maintenance, etcetera; and the manual hand-unloading process into Town compactors and the labor associated with recycling route days.*

Terms:

- **Disposal/Tipping Fees:** These fees remain the responsibility of the Town of Montreat.
- **Contract Term:** Initial 1-year contract with a preference for a **5+ year renewal** based on performance.
- **Additional Services:** Second weekly pickups are available at $3.00 per household per week (charged to all residents). Bear-incident cleanups are billed at $250 per occurrence.

7. Professional References

Contact Name	Title/Entity	Phone	Email
Mayor Zeb Smathers	Town of Canton, NC	828-421-8992	ZLSMATHERS@GMAIL.COM
Ronnie Palmer	Former Owner, RJ Sanitation	828-557-7233	RONNIEPALMER67@HOTMAIL.COM
Andrew Reel	Former Owner, 4 Reel Trash	828-527-9321	4REELTRASH@GMAIL.COM
Stephen Phillips	Owner, Benny's Sanitation	706-781-4878	stevenphillips505@gmail.com
Caitlin Vargas	Republic Services (WOLF)	805-607-6347	CAITIEVARGAS@GMAIL.COM
Kim Smith	Waste Management	478-731-6080	KSSMITH13@WM.COM

Signatures

Submitted by: Midsouth USA, Inc

Signature: _____

Date: _____

Michael Parrott Owner, Midsouth USA, INC.

828-476-6771 | Michael.Parrott@Mid-South.co

Accepted by: The Town of Montreat:

Savannah Parrish Town Manager, Town of Montreat

Signature: _____

Date: _____

Attest: _____

Town Clerk / Official Witness

Town of Montreat
2026-2027 Budget Summary

	FY 25-26	FY 26-27	% +/-
Revenues			
General Fund	$2,077,915	$2,519,618	21.26%
Water Fund	$424,900	$578,100	36.06%
Total	**$2,502,815**	**$3,097,718**	**23.77%**
Expenses			
Governing Body	$53,222	$53,703	0.90%
Administration	$560,714	$642,317	14.55%
Public Buildings	$128,097	$126,891	-0.94%
Police	$539,521	$625,675	15.97%
Planning & Zoning	$99,900	$95,257	-4.65%
Public Works	$152,142	$251,925	65.59%
Streets	$313,369	$461,793	47.36%
Sanitation	$208,900	$232,320	11.21%
Recreation	$22,050	$29,737	34.86%
Water	$424,900	$578,100	36.06%
Total	**$2,502,815**	**$3,097,718**	**23.77%**

Payroll	**FY 25-26 Salaries**	**Payroll**	**FY 26-27 Salaries**	**% +/-**
Administration	$250,047	Administration	$284,170	12%
Police	$346,301	Police	$359,900	4%
Public Works	$84,100	Public Works	$92,300	9%
Streets	$108,000	Streets	$166,840	35%
Sanitation	$50,400	Sanitation	$11,260	-348%
Planning & Zoning	$29,320	Planning & Zoning	$58,500	50%
Water	$87,200	Water	$92,000	5%
Total	**$955,368**	**Total**	**$1,064,970**	

Includes a 3% merit increase	$	16,003.66
Total Increase	$	109,602.40

January 1, 2026 and 2020 Revenue Neutral Rate Calculation

Fiscal year	Assessed Valuation as of June 30	Annexation	(Deannexa	Total Adjusted for Annexation or Deannexation	Valuation Increase (Decrease)	Percentage change
2025-2026 Revaluation 1/1/2027	449,264,283	**Based or	25-26	449,264,283	148,156,149	49.20%
			24-25	301,108,134		
2024-2025	301,108,134	0	24-25	301,108,134	1,834,427	0.61%
			23-24	299,273,707		
2023-2024	299,273,707	0	23-24	299,273,707	6,107,821	2.08%
			22-23	293,165,886		
2022-2023	293,165,886	0	22-23	293,165,886	4,308,465	1.49%
			21-22	288,857,421		
2021-2022	288,857,421	0	21-22	288,857,421	37,947,654	15.12%
			20-21	250,909,767		
2020-2021 Revaluation 1/1/2021	250,909,767					

4.83% Average growth % Doesn't include revaluation increase (decrease)

		Tax rate		Estimated tax levy
Last year prior to revaluation				
2025-2026	301,108,134		0.43	$ 1,294,764.98
First year of revaluation		Tax rate to produce equivalent levy		
2026-2027	449,264,283		0.29	$ 1,294,764.98
		Revenue neutral tax rate, to be included in budget ordinance, adjusted for growth		
Increase (decrease) tax rate for average growth rate				
2026-2027	449,264,283		0.30	$ 1,357,276.03
		Increase (Decrease) in Tax Levy		62511.05585
	Average Percentage Increase (Decrease)			4.83%

Summary

General Revenue	2,519,618
General Expenses	2,519,618
Excess	(0)
Water Revenue	578,100
Water Expenses	578,100
Excess	**0**
Total budget	3,097,718
A penny of the current tax rate of .375 generates:	44,926.43

HIGHLIGHTS:

3% Merit Increase (up to)

Contributing 75% of the employee's cost to obtain family coverage

FY 2027 Total Budget is 23.77% higher than FY 2026 Budget
FY 2027 General Fund Budget is 21.26% higher than FY 2026 Budget
FY 2027 Water Fund Budget is 36.06% higher than FY 2026 Budget which provides for the replacement of the water pickup truck and necessary hydrant repairs.
Water paying indirect costs to General Fund at 8.5%

Capital Projects Include:
Tractor Replacement
Take Home Vehicle Policy
Replacement of PW Pickup Truck
Compactor Upgrades
Replacement of Water Pickup Truck
Hydrant Repair

General Fund
Schedule of Revenues

Account Number	Account Name	Board Approved FY25-26	Recommended FY 26-27	Board Approved FY 26-27	
10-3000-100	Taxes, Ad Valorem - Prior	0	0	0	
10-3005-100	Taxes, Ad Valorem - Current	1,250,000	1,650,000		Revaluation DROP TO .395
10-3065-100	NC Sales & Use Tax	$440,000	500,000		NCLM Estimates 3.10% increase - Conservative with actual receipts of curr
10-3194-100	DMV Taxes - Current Yea	25,900	28,800		Revaluation DROP TO .395
10-3205-200	Utilities Franchise Tax	89,600	89,600		NCLM Estimates 1% decrease - keep the same given current
10-3220-200	Beer & Wine Tax	3,650	3,650		Maintain same projection
10-3235-200	Solid Waste Disposal Tax	650	658		NCLM projects a 3.25% increase
10-3300-300	Contributions	3,500	3,500		0
10-3550-800	Community Service Fee	45,700	45,700		Used Previous Years
10-3800-800	Interest on Investments	500	500		0
10-3805-800	Interest on Powell Bill	15	10		0
10-3815-800	Miscellaneous Revenues	200	200		0
10-3820-800	Sale of Fixed Assets	0	20,000		PW pickup and tractor
10-3905-900	Fund Balance Appropriated	0	0		0
10-3915-900	Transfer from Water Fund	0	0		0
10-3340-400	Grant Proceeds	0	0		0
10-3405-400	Arrest Fees and Fines	60	60		No information on this
10-3430-400	Building Permits	30,000	0		No revenue from building inspections/no in-house building inspector
10-3434-400	Zoning Permits	4,000	4,000		0
10-3435-400	Sanitation Fees	126,140	112,140		0
10-3435-410	Back Door Pickup	2,000	3,300		0
10-3435-420	Special Pick Up	2,000	3,500		0
10-3325-300	Powell Bill Grant	54,000	54,000		See Tab
10-3825-800	Cash Over/Cash Short	0	0		0
10-3925-900	Powell Bill Fund Balance App.	0	0		0
10-3980-900	Debt Proceeds (For Kubota)	0			
	General Fund Totals	2,077,915	$2,519,618	$0	

Water Fund

Schedule of Revenues

Account Number	Account Name	Board Approved FY25-26	Recommended FY 26-27	Board Approved FY 26-27	
30-3400-400	MSD Billing Fees Revenue	24,000	**24,000**		0
30-3500-500	Water Sales	190,000	**195,000**		Water rate increases of 5% across the board
30-3500-600	Water Access Fees	175,000	**190,000**		0
30-3500-800	Billing Fee Revenue	10,000	**22,000**		0
30-3505-500	Water Taps	500	**5,000**		0
30-3505-700	Water Transfer Fees	1,000	**1,000**		Based on an average of 2 per month @ $25 each
30-3610-600	Special Assesment	22,000	**0**		Paid in full
30-3805-800	Interest on Investments	300	**300**		Based on previous year receipts
30-3815-700	Reconnect Fees	300	**300**		0
30-3810-800	Miscellaneous Revenue	300	**3,500**		added new fees - premise visit fee
30-3815-800	Late Fees	1,500	**2,000**		Based on previous year receipts
30-3820-800	Sale of Fixed Assets	0	**35,000**		Backhoe and water pickup
30-3550-800	Interfund Transfer from General	0	**0**		0
30-3905-900	Fund Balance Appropriated	0	**100,000**		0
	Water Fund Totals	$424,900	**$578,100**	$0	

4100-Governing Body

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-4100-020	SALARIES & WAGES	9,800	9,800		0
10-4100-050	FICA EXPENSE	751	800		0
TOTALS:	**PERSONNEL SERVICES**	10,551	10,600	0	0
OPERATING EXPENSES:					
10-4100-040	PROFESSIONAL SERVICES	35,000	38,000		Auditor
10-4100-110	TELEPHONE	0	0		0
10-4100-120	RENT	0	0		0
10-4100-140	TRAVEL AND TRAINING	2,500	2,500		0
10-4100-260	ADVERTISING	200	200		0
10-4100-330	DEPARTMENT SUPPLIES	1,800	2,540		AV Assist hardware ($740)
10-4100-331	CONTINGECY	0	0		0
10-4100-332	SALARY CONTINGENCY	3,000	3,000		0
10-4100-335	DUPLICATING AND PRINTING	0	0		0
10-4100-450	CONTRACT SERVICES	0	0		0
10-4100-480	INDIRECT COST ALLOCATION - WF	-5,429	-7,137		0
10-4100-520	CONTRIBUTIONS	500	500		0
10-4100-530	DUES AND SUBSCRIPTIONS	3,500	3,500		0
10-4100-570	INTER-FUND TRANSFER	0	0		0
TOTALS:	**OPERATING EXPENSES**	41,071	43,103	0	0
CAPITAL OUTLAY:					
10-4100-730	CAPITAL OUTLAY	1,600	0		0
TOTALS:	**CAPITAL OUTLAY**	1,600	0	0	0
DEBT PAYMENT:					
10-4100-900	DEBT PAYMENT	0	0	0	0
TOTALS:	**DEBT PAYMENT**	0	0	0	0
GOVERNING BODY DEPARTMENT TOTAL:		53,222	53,703	0	

4200-Administration

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-4200-020	SALARIES & WAGES	250,047	284,170		0
10-4200-050	FICA EXPENSE	19,144	21,300		0
10-4200-060	GROUP HEALTH INSURANCE	54,870	63,000		0
10-4200-070	RETIREMENT	48,384	55,800		0
TOTALS:	***PERSONNEL SERVICES***	372,445	424,270	0	
OPERATING EXPENSES:					
10-4200-040	PROFESSIONAL SERVICES	53,000	72,217		ATTY - Allen Stahl & Kilbourne
10-4200-080	INSURANCE	20,000	25,000		Workers Comp Insurance
10-4200-081	MEDICAL CERTIFICATION	-	0		0
10-4200-100	POSTAGE	2,000	3,000		0
10-4200-110	TELEPHONE	8,000	8,000		0
10-4200-140	TRAVEL & TRAINING	16,000	12,000		0
10-4200-260	ADVERTISING	600	600		0
10-4200-320	OFFICE EXPENSE	6,500	11,000		$4850.31RLE Desktop Replace, Hey Gov/Clerk Minutes ($1188)
10-4200-321	IT SUPPORT	70,000	83,729		Constant Contact ($950), Zoom ($850), Network Infrastructure ($9104.63)
10-4200-330	DEPARTMENTAL SUPPLIES	4,000	5,000		0
10-4200-331	CONTINGENCY	2,000	0		0
10-4200-335	DUPLICATING AND PRINTING	6,000	6,000		0
10-4200-342	BANK SERVICE CHARGES	1,000	1,000		0
10-4200-343	PENALTIES	300	300		0
10-4200-450	CONTRACT SERVICES	40,000	45,000		TH Cleaning ($1620), JOSH
10-4200-480	INDIRECT COST ALLOCATION	(43,432)	-57,099		0
10-4200-520	CONTRIBUTIONS	-	0		0
10-4200-530	DUES & SUBSCRIPTIONS	2,000	2,000		0
10-4200-550	SUPERVISOR'S EXPENSE	300	300		0
10-4200-572	INTERFUND TRANSFER	-	0		0
TOTALS:	***OPERATING EXPENSES***	188,268	218,047	0	
CAPITAL OUTLAY:					
10-4200-730	CAPITAL OUTLAY	-	0	0	#REF!
TOTALS:	***CAPITAL OUTLAY***	-			
DEBT PAYMENT:					
10-4200-900	DEBT PAYMENT	1	0		DST Cash flow loans
TOTALS:	***DEBT PAYMENT***	1	0		
ADMINISTRATION DEPARTMENT TOTAL:		560,714	642,317	0	

5000-Public Buildings

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:		0	0	0	0.00
TOTALS:	**PERSONNEL SERVICES**	$0	**$0**	**$0**	
OPERATING EXPENSES:					
10-5000-080	INSURANCE	40,000	**44,000**		Prop/liability
10-5000-130	UTILITIES	10,000	**10,000**		0.00
10-5000-150	M&R BUILDINGS & GROUNDS	3,500	**3,900**		Material increase
10-5000-330	DEPARTMENTAL SUPPLIES	1,000	**1,100**		0.00
10-5000-450	CONTRACT SERVICES	1,000	**1,500**		0.00
10-5000-480	INDIRECT COST ALLOCATION	-13,030	**-17,130**		0.00
10-5000-540	INTEREST EXPENSE	18,960	**16,854**	**16,854**	TH Loan Int.
10-5000-571	INTERFUND TRANSFER	0	**0**		0.00
TOTALS:	**OPERATING EXPENSES**	$61,430	**60,224**	**16,854**	
CAPITAL OUTLAY:					
10-5000-730	CAPITAL OUTLAY	0	**0**	**0**	0.00
TOTALS:	**CAPITAL OUTLAY**	$0	**0**	**0**	
DEBT PAYMENT:					
10-5000-900	DEBT SERVICING	66,667	**66,667**	**66,667**	TH Loan
TOTALS:	**DEBT PAYMENT**	$66,667	**66,667**	**66,667**	
PUBLIC BUILDINGS DEPARTMENT TOTAL:		$128,097	**126,891**	**83,521**	

5100-Police

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-5100-020	SALARIES & WAGES	291,842	307,842		0
10-5100-021	SEPARATION ALLOWANCE	0	0		0
10-5100-050	FICA EXPENSE	26,400	27,600		0
10-5100-060	GROUP HEALTH INSURANCE	44,400	87,600		0
10-5100-070	RETIREMENT - LOCAL GOVT.	50,400	68,000		0
TOTALS:	**PERSONNEL SERVICES**	$413,042	$491,042	$0	
OPERATING EXPENSES:					
10-5100-081	MEDICAL CERTIFICATION	3,000	4,000		$1000 per officer onboarding
10-5100-110	TELEPHONE	3,500	2,125		0
10-5100-140	TRAVEL & TRAINING	2,000	2,500		Officer professional development
10-5100-160	M & R EQUIPMENT	6,820	7,000		Body armor - 2 officers
10-5100-170	M & R AUTO	12,500	12,500		Aging fleet
10-5100-234	PUBLIC SAFETY EDUCATION	1,000	1,250		Coffee with a cop, safety Saturday
10-5100-310	AUTO SUPPLIES	13,000	20,000		Take home veh. Policy
10-5100-330	DEPARTMENT SUPPLIES	2,500	2,700		0
10-5100-360	UNIFORMS	7,500	7,500		boot allowance, Uniforms
10-5100-530	DUES & SUBSCRIPTIONS	12,500	15,300		Software, CODE RED
10-5100-735	MACHINERY AND EQUIPMENT	7,700	7,700		Purchase addtl radio
10-5100-740	AUXILARY	54,459	52,058		reserve officers
10-5100-760	DISPATCHER SERVICES	0	0		0
TOTALS:	**OPERATING EXPENSES**	$126,479	134,633	0	
CAPITAL OUTLAY:					
10-5100-730	CAPITAL OUTLAY	0	0	0	0
TOTALS:	**CAPITAL OUTLAY**	$0	0	0	
DEBT PAYMENT:					
10-5100-900	DEBT PAYMENT	0	0	0	0
TOTALS:	**DEBT PAYMENT**	$0	0	0	
POLICE DEPARTMENT TOTAL:		$539,521	625,675	0	

5400-Planning and Zoning

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-5400-020	SALARIES & WAGES	29,320	58,500	0	Shelly
10-5400-040	PROFESSIONAL SERVICES	5,713	0	0	0.00
10-5400-050	FICA EXPENSE	0	4,500	0	0
10-5400-060	GROUP HEALTH INSURANCE	0	1,500	0	Ins. Stipend
10-5400-070	RETIREMENT - LOCAL GOVT.	0	0	0	0.00
TOTALS:	**PERSONNEL SERVICES**	$35,033	$64,500	$0	
OPERATING EXPENSES:					
10-5400-140	TRAVEL AND TRAINING	600	3,572		0.00
10-5400-260	ADVERTISING	800	685		0.00
10-5400-320	OFFICE EXPENSE	4,000	3,000		0.00
10-5400-330	DEPARTMENT SUPPLIES	500	1,500		0.00
10-5400-331	PLANNING BOARD	0	1,000		0.00
10-5400-332	BOARD OF ADJUSTMENT	0	1,000		0.00
10-5400-335	DUPLICATING AND PRINTING	0	0		0.00
10-5400-450	CONTRACT SERVICES - BLDG. INSP.	18,833	20,000		Buncombe Co.
10-5400-452	CONTRACTED SERVICES - ZONE	40,134	0		Hired Shelly
10-5400-530	DUES & SUBSCRIPTIONS	0	0		0.00
TOTALS:	**OPERATING EXPENSES**	$64,867	30,757	0	
CAPITAL OUTLAY:					
10-5400-730	CAPITAL OUTLAY	0	0	0	0.00
TOTALS:	**CAPITAL OUTLAY**	$0	0	0	
DEBT PAYMENT:					
10-5400-900	DEBT PAYMENT	0	0	0	0.00
TOTALS:	**DEBT PAYMENT**	$0	0	0	
PLANNING AND ZONING DEPARTMENT TOTAL:		$99,900	95,257	0	

5550-Public Works

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-5550-020	SALARIES & WAGES	84,100	92,300		0
10-5550-021	SEPERATION ALLOWANCE	0	0		0
10-5550-040	PROFESSIONAL SERVICES	0	0		0
10-5550-050	FICA EXPENSE	6,500	7,100		0
10-5550-060	GROUP HEALTH INSURANCE	21,400	24,500		0
10-5550-070	RETIREMENT - LOCAL GOVT.	16,300	18,600		0
TOTALS:	**PERSONNEL SERVICES**	$128,300	$142,500		
OPERATING EXPENSES:					
10-5550-081	MEDICAL CERTIFICATION	0	0		0
10-5550-110	TELEPHONE	5,500	5,500		0
10-5550-140	TRAVEL & TRAINING	4,000	4,000		0
10-5550-160	M & R EQUIPMENT	6,734	4,000		
10-5550-170	M & R TRUCKS	4,000	4,000		0
10-5550-310	AUTO SUPPLIES	4,000	4,000		0
10-5550-330	DEPARTMENT SUPPLIES	5,266	5,000		0
10-5550-335	DUPLICATING AND PRINTING	0	0		0
10-5550-360	UNIFORMS	700	700		0
10-5550-370	STORMWATER PROGRAM	3,000	3,000		0
10-5550-735	MACHINERY AND EQUIPMENT	0	7,000		Saws, Arbor Equipment
10-5550-480	INDIRECT COST ALLOCATION	-10,858	-14,275		0
10-5550-530	DUES & SUBSCRIPTIONS	1,500	1,500		0
10-5550-572	MATERIALS	0	0		0
TOTALS:	**OPERATING EXPENSES**	$23,842	24,425	0	
CAPITAL OUTLAY:					
10-5550-730	CAPITAL OUTLAY	0	85,000	0	PU Truck
TOTALS:	**CAPITAL OUTLAY**	$0	85,000	0	
DEBT PAYMENT:					
10-5550-900	DEBT PAYMENT	0	0	0	0
TOTALS:	**DEBT PAYMENT**	$0	0	0	
PUBLIC WORKS DEPARTMENT TOTAL:		$152,142	251,925	0	

5600-Streets

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-5600-020	SALARIES & WAGES	108,000	166,840		80% of Drew's Salary
10-5600-050	FICA EXPENSE	8,300	12,839		0
10-5600-060	GROUP HEALTH INSURANCE	41,800	66,328		0
10-5600-070	RETIREMENT - LOCAL GOVT.	20,900	33,537		0
TOTALS:	**PERSONNEL SERVICES**	$179,000	$279,544	$0	
OPERATING EXPENSES:					
10-5600-110	TELEPHONE	0	0		0
10-5600-140	TRAVEL & TRAINING	2,000	2,000		0
10-5600-160	M & R EQUIPMENT	5,000	3,000		Tractor Repairs
10-5600-170	M & R TRUCKS	12,000	5,000		0
10-5600-310	AUTO SUPPLIES	6,000	8,000		0
10-5600-330	DEPARTMENT SUPPLIES	10,000	10,000		0
10-5600-335	DUPLICATING AND PRINTING	0	0		0
10-5600-340	REPAIR AND WIDENING	20,000	20,000		0
10-5600-360	UNIFORMS	2,000	2,800		0
10-5600-450	CONTRACT SERVICES	3,500	0		0
10-5600-480	INDIRECT COST ALLOCATION	-35,831	-47,107		0
10-5600-540	INTEREST EXPENSE	4,000	5,400		TX Rd Bridge - Kubota
10-5600-572	INTERFUND TO SPECIAL REV	0	0		0
10-5600-740	STREET LIGHTING	25,000	28,000		Rate Increase
10-5600-745	STORMWATER IMPROVEMENTS	6,000	6,000		0
10-5600-750	ROAD MAINTENANCE	8,000	11,255		0
10-5600-755	SIGNS AND PAINTING	6,000	6,000		0
10-5600-760	BRIDGE INSPECTIONS	2,000	2,000		0
10-5600-765	SURVEYS/MAPPING	3,000	3,000		0
10-5600-770	SNOW REMOVAL	4,500	7,500		Equip Repairs
10-5600-775	LEAF REMOVAL		0		0
TOTALS:	**OPERATING EXPENSES**	$83,169	72,848	0	
CAPITAL OUTLAY:					
10-5600-730	CAPITAL OUTLAY	0	57,700	0	Tractor
TOTALS:	**CAPITAL OUTLAY**	$0	57,700	0	
DEBT PAYMENT:					
10-20-5600-900	DEBT PAYMENT	51,200	51,700	51,700	TX Rd bridge - Kubota - Loans
TOTALS:	**DEBT PAYMENT**	$51,200	51,700	51,700	
STREET DEPARTMENT TOTAL:		$313,369	461,793	51,700	

5800-Sanitation

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
10-5800-020	SALARIES & WAGES	50,400	11,260		80% of Drew's Salary
10-5800-050	FICA EXPENSE	3,900	861		
10-5800-060	GROUP HEALTH INSURANCE	32,500	7,372		0
10-5800-070	RETIREMENT - LOCAL GOVT.	9,800	2,263		0
TOTALS:	**PERSONNEL SERVICES**	$96,600	$21,756	$0	
OPERATING EXPENSES:					
10-5800-130	UTILITIES	2,500	2,700		0
10-5800-160	M & R EQUIPMENT	3,700	2,000		0
10-5800-170	M & R TRUCKS	3,000	0		0
10-5800-310	AUTO SUPPLIES	5,800	1,000		0
10-5800-330	DEPARTMENTAL SUPPLIES	3,500	1,000		0
10-5800-332	CONTINGENCY	5,000	1,000		0
10-5800-360	UNIFORMS	800	0		0
10-5800-451	CONTRACT SERVICES-DUMPSTER	60,000	30,000		REDUCED FOR CONTRACT
10-5800-452	Contract Services - Weekly Sanitation Service	0	142,864		CONTRACTED SERVICE
10-5800-454	CONTRACT SERVICES - SANITATION	13,000	0		FIRST
10-5800-480	INDIRECT COST ALLOCATION	0	0		0
10-5800-550	TIPPING FEES	15,000	20,000		Rates Increasing
TOTALS:	**OPERATING EXPENSES**	$112,300	$200,564	$0	
CAPITAL OUTLAY:					
10-5800-730	CAPITAL OUTLAY	0	10,000	0	compactor conversions,
TOTALS:	**CAPITAL OUTLAY**	$0	$10,000	$0	
DEBT PAYMENT:					
10-5800-900	DEBT PAYMENT	0	0	0	0
TOTALS:	**DEBT PAYMENT**	$0	$0	$0	
SANITATION DEPARTMENT TOTAL:		$208,900	$232,320	$0	

6190-Recreation

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
		0	0	0	0.00
TOTALS:	**PERSONNEL SERVICES**	$0	$0	$0	
OPERATING EXPENSES:					
10-6190-335	DUPLICATING AND PRINTING	550	550	550	0.00
10-6190-340	LANDCARE COMMITTEE	1,500	3,000	3,000	LANDCARE includes previous years balance
10-3340-452	LANDCARE GRANT - HEMLOCKS	0	0	0	0.00
10-6190-710	OPEN SPACE CONSERVATION	0	1,000	1,000	0.00
10-6190-753	TREE MAINTENANCE	20,000	25,187	25,187	0.00
TOTALS:	**OPERATING EXPENSES**	$22,050	$29,737	$29,737	
CAPITAL OUTLAY:					
10-6190-730	CAPITAL OUTLAY	0	0	0	0.00
TOTALS:	**CAPITAL OUTLAY**	$0	$0	$0	
DEBT PAYMENT:					
10-6100-900	DEBT PAYMENT	0	0	0	0.00
TOTALS:	**DEBT PAYMENT**	$0	$0	$0	
RECREATION DEPARTMENT TOTAL:		$22,050	$29,737	$29,737	

30-Water

ACCOUNT NUMBER	DESCRIPTION	Board Approved FY 25-26	Recommended FY26-27	Board Approved FY26-27	
PERSONNEL SERVICES:					
30-8100-020	SALARIES & WAGES	87,200	92,000		0
30-8100-050	FICA	6,700	7,100		0
30-8100-060	GROUP HEALTH INSURANCE	20,400	13,600		0
30-8100-070	RETIREMENT	12,200	13,700		0
TOTALS:	**PERSONNEL SERVICES**	$126,500	**$126,400**	$0	
OPERATING EXPENSES:					
30-8100-030	WATER SAMPLES	8,000	**8,000**		0
30-8100-040	PROFESSIONIAL SERVICES	0	**8,223**		0
30-8100-100	POSTAGE	5,000	**5,000**		0
30-8100-110	TELEPHONE	500	**500**		0
30-8100-130	UTILITIES	50,000	**48,940**		0
30-8100-140	TRAVEL AND TRAINING	3,500	**4,022**		0
30-8100-150	M&R WELLS	48,000	**50,000**		Well repairs increase
30-8100-160	M&R EQUIPMENT	12,320	**10,000**		0
30-8100-170	M&R TRUCKS	2,000	**2,000**		0
30-8100-310	AUTO SUPPLIES	4,500	**5,500**		Material Increase
30-8100-330	DEPARTMENTAL SUPPLIES	8,000	**11,763**		DT Computer $1127.78
30-8100-340	SPECIAL ASSESSMENT EXPENSE	1,000	**0**		0
30-8100-480	INDIRECT COST ALLOCATION	108,580	**142,747**		0
30-8100-530	DUES & SUBSCRIPTIONS	3,600	**3,600**		0
30-8100-540	INTEREST EXPENSE	3,000	**1,020**		0
TOTALS:	**OPERATING EXPENSES**	$258,000	**$301,315**	$0	
CAPITAL OUTLAY:					
30-8100-730	CAPITAL OUTLAY	0	**120,385**	0	Truck and Hydrant Repairs
30-8100-770	WATER PROJECT	0	**0**	0	0
TOTALS:	**CAPITAL OUTLAY**	$0	**$120,385**	$0	
DEBT PAYMENT:					
30-8100-900	DEBT PAYMENT	40,400	**30,000**		0
TOTALS:	**DEBT PAYMENT**	$40,400	**$30,000**	$0	
WATER DEPARTMENT TOTAL:		$424,900	**$578,100**	$0	

CAPITAL OUTLAY PROJECTS: FY 2026-2027

Department	Project		Cost	Funding General Fund	Funding ARPA	Powell Funded	Not Funded	Total Cap Outlay
Police	Take home vehicle		$0	$0	$0	$0	$0	$0
			$0	$0	$0	$0	$0	$0
		TOTALS	**$0**	**$0**	$0	$0	$0	**$0**

			Cost	Funding General Fund	Debt Service	Powell Funded	Not Funded	Total Cap Outlay
Street	TRACTOR		$57,000	$57,000	$0	$0	$0	$57,000
			$0	$0	$0	$0	$0	$0
		TOTALS	**$57,000**	**$57,000**	**$0**	**$0**	**$0**	**$57,000**

			Cost	Funding Water Fund	Funding ARPA	Powell Funded	Not Funded	Total Cap Outlay
Water	TRUCK		$90,383	$90,383	$0	$0	$0	$90,383
	HYDRANT REPAIRS		$30,000	$30,000				$30,000
		TOTALS	**$120,383**	$120,383	$0	$0	$0	**$120,383**

			Cost	Funding General Fund	Funding ARPA	Powell Funded	Not Funded	Total Cap Outlay
Public Works	TRUCK		$85,000	$85,000	$0	$0	$0	$85,000
			$0	$0	$0	$0	$0	$0
		TOTALS	**$85,000**	**$85,000**	$0	$0	$0	**$85,000**

			Cost	Funding General Fund	Funding ARPA	Powell Funded	Not Funded	Total Cap Outlay
Sanitation								
	COMPACTOR CONVERSIONS		$10,000	$10,000	$0	$0	$0	$10,000
		TOTALS	**$10,000**	**$10,000**	$0	$0	$0	**$10,000**

Town of Montreat
Fiscal Year 2026-2027
Budget



Introduction

BUDGET MESSAGE

June 11, 2026

TO: Mayor Tim Helms
Mayor Pro Tem Kitty Fouche
Commissioner Jane Alexander
Commissioner Tom Widmer
Commissioner Mason Blake
Commissioner Grant Dasher

FROM: Savannah Parrish, Town Manager

Dear Mayor and Board of Commissioners,

I am pleased to present the proposed Fiscal Year 2026–2027 Budget for the Town of Montreat. This budget reflects a thoughtful and responsible approach to maintaining essential services, investing in our staff, and addressing ongoing infrastructure needs.

The proposed General Fund budget totals $2,519,618, representing a 21.26% increase over the current fiscal year. This budget does not include an appropriation of General Fund balance. However, a Water Fund balance appropriation is included to address necessary infrastructure repairs.

The proposed ad valorem tax rate for FY 2026–2027 is $0.375 per $100 of assessed valuation. This is a reduction of $0.055 from the prior year and reflects our continued effort to provide tax relief while maintaining the level of service our residents expect. The Town's tax base, as reported by Buncombe County, is $449,264,283.

Budget Overview

The total proposed budget for FY 2026–2027 is $3,097,718, an increase of 23.77% from the previous year. General Fund revenues are projected at $2,519,618, while the Water Fund totals $578,100, a 36.06% increase.

This budget was developed with a focus on balance—ensuring we meet current needs without losing sight of long-term priorities or service expectations.

Key Budget Drivers

Personnel Investment: A 3% merit-based increase is included across all departments to support recruitment and retention of qualified staff.

Public Safety: The Police Department budget reflects a 15.97% increase to support staffing, operational readiness, and the implementation of a take-home vehicle program.

Sanitation: An 11.21% increase reflects the transition to contracted solid waste services, allowing approximately 80% of the sanitation operator's time and salary to shift to the Streets Department.

Street Maintenance: Expenditures in this area have increased by 47.36%, primarily due to critical equipment needs and the addition of personnel capacity from sanitation.

Recreation and Public Works: Increases of 34.86% and 65.59%, respectively, are driven by rising costs and necessary equipment investments, while maintaining core service levels.

Challenges and Opportunities

Like many small municipalities, Montreat continues to navigate rising costs, aging infrastructure, and increasing service expectations. These realities require careful prioritization and disciplined use of available resources.

Even with these challenges, the Board remains committed to:

- Delivering high-quality municipal services
- Supporting and retaining a strong workforce
- Addressing deferred maintenance and planning for capital needs
- Maintaining healthy fund balance levels to ensure long-term stability

Looking Ahead

While this budget reflects some improvement in the Town's financial position, it also highlights the need to address critical equipment and infrastructure needs. Strategic investments in these areas will support reliable, safe, and efficient operations across departments.

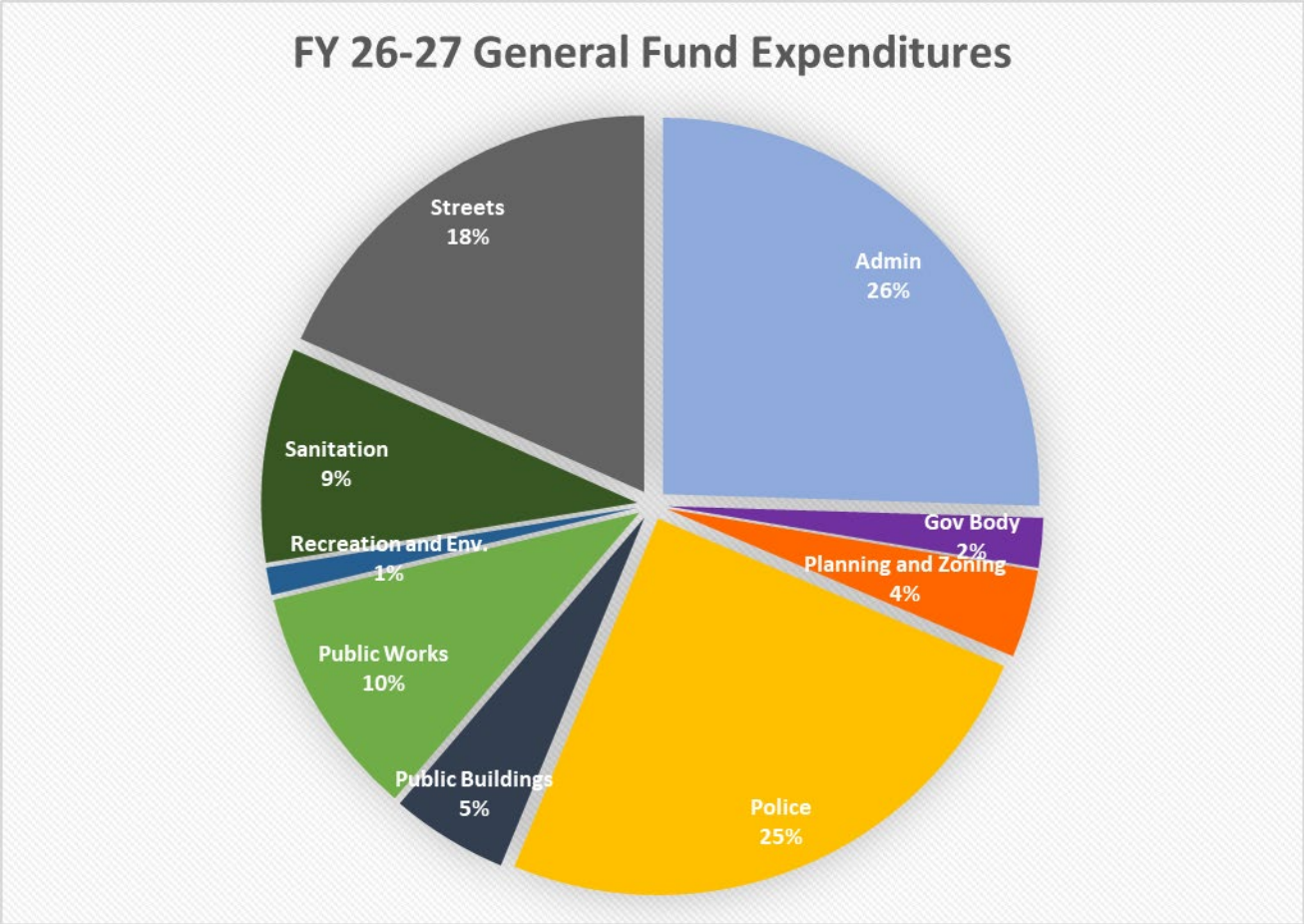
We will continue to pursue grant opportunities, partnerships, and cost-sharing efforts to support these investments while minimizing the impact on taxpayers. As always, spending will be adjusted as needed to prioritize core services and maintain long-term financial stability.

Conclusion

The proposed General Fund budget for FY 26-27 includes the revenues and expenditures as outlined in the following tables:

Revenue	FY 25-26	FY 26-27	Percent Change
Water Fund Revenue	$424,900	$578,100	36.06%
General Fund Revenue	$2,077,915	$2,519,618	21.26%
Combined	$2,502,815	$3,097,718	23.77%

Expense - GF	FY 25-26	FY 26-27		Percent Change
Admin	$ 560,714	$ 642,317		14.55%
Gov Body	$ 53,222	$ 53,703		0.90%
Planning and Zoning	$ 99,900	$ 95,257		-4.65%
Police	$ 539,521	$ 625,675		15.97%
Public Buildings	$ 128,097	$ 126,891		-0.94%
Public Works	$ 152,142	$ 251,925		65.59%
Recreation and Env.	$ 22,050	$ 29,737		34.86%
Sanitation	$ 208,900	$ 232,320		11.21%
Streets	$ 313,369	$ 461,793		47.36%
Subtotal	$2,077,915	$2,519,618		21.26%
Expense - Water	$ 424,900	$ 578,100		36.06%
Subtotal	$ 424,900	$ 578,100		36.06%



The FY 2026–2027 budget is fiscally responsible and service-oriented. It reflects Montreat's enduring values of stewardship, transparency, and community commitment. I thank the Board of Commissioners for their leadership, and Town staff for their dedication to public service.

Respectfully submitted,

Savannah Parrish
Town Manager

TOWN OF MONTREAT
2026-2027 BUDGET ORDINANCE

BE IT ORDAINED BY THE BOARD OF COMMISSIONERS OF THE TOWN OF MONTREAT, NORTH CAROLINA:

Section 1. The following amounts are hereby appropriated in the General Fund for the operation of the Town Government and its activities for the fiscal year beginning July 1, 2026 and ending June 30, 2027 in accordance with the chart of accounts heretofore established for this Town:

Governing Board	$53,703
Administration	$642,317
Public Buildings	$126,891
Police	$625,675
Planning and Zoning	$95,257
Public Works	$251,925
Streets and Powell Bill	$461,793
Sanitation	$232,320
Recreation	$29,737
Total Expenditures	**$2,519,618**

Section 2. It is estimated that the following revenues will be available to the General Fund for the fiscal year beginning July 1, 2026 and ending June 30, 2027:

Taxes, Ad Valorem – Current	$1,650,000
NC Sales & Use Tax	$500,000
Taxes, Personal	$28,800
NC Franchise Tax	$89,600
Beer & Wine Tax	$3,650
Solid Waste Disposal Tax	$658
Contributions	$3,500
Community Service Fee	$45,700
Interest on Investments	$500
Interest on Powell Bill	$10
Fund Balance Appropriated	$0
Court Costs – Arrest Fees & Fines	$60
Misc Revenue	$200
Sale of Fixed Assets	$20,000
Zoning Permits	$4,000
Sanitation Fees	$112,140
Special Pick Up	$3,500
Back Door Pickup	$3,300
Powell Bill Grant	$54,000
Total Revenues	**$2,519,618**

Section 3. The following amounts are hereby appropriated in the Water Fund for the fiscal year beginning July 1, 2026, and ending June 30, 2027, in accordance with the chart of accounts heretofore approved for the Town:

Water Fund	$578,100
Total Expenditures	**$578,100**

Section 4. It is estimated that the following Revenues will be available in the Water Fund for the fiscal year beginning July 1, 2026, and ending June 30, 2027:

MSD Billing Fees Revenue	$24,000
Water Sales	$195,000
Water Access Fees	$190,000
Billing Fee Revenue	$22,000
Water Taps	$5,000
Water Transfer Fees	$1,000
Sale of Fixed Assets	$35,000
Interest on Investments	$300
Reconnect Fees	$300
Late Fees	$2,000
Misc Revenues	$3,500
Fund Balance Appropriated	$100,000
Total Revenue	**$578,100**

Section 5. The Budget Officer/Finance Officer is hereby authorized to distribute department funds upon the line-item budget and make expenditures therefrom, in accordance with the Local Government Budget and Fiscal Control Act.

Section 6. The Budget Officer/Finance Officer is hereby authorized to transfer appropriations as contained herein under the following conditions:

A. He/she may transfer amounts between line items, expenditures and revenues, within a department without limitation and without a report being required.

B. He/she may transfer amounts up to $5,000 between departments within any one division, including contingency appropriations, within the same fund during any month. For the purpose of this ordinance, the Town of Montreat has the following divisions: Public Works (Streets and Sanitation), Police, Governing Body, Administration, Public Buildings, Planning and Zoning, and Recreation. The Budget Officer/Finance Officer must make an official report on such transfers at the next regular meeting of the Governing Board. Transfers between divisions would require action of the Governing Board.

C. He/she may not transfer any amounts between funds, except as approved by the Governing Board in the Budget Ordinance as amended.

Section 7. There is hereby levied a tax at the rate of thirty-seven and one-half cents (0.375) per one hundred dollars ($100) valuation of property as listed for taxes as of January 1, 2027 for the purpose of raising the revenue listed as "Taxes Ad Valorem - Current Year" in the General Fund in Section 2 of this Ordinance. The estimated rate of collection is 99.69%.

Section 8. The Town of Montreat Fee Schedule, FY 2026-2027, as attached, is hereby incorporated into this annual budget ordinance, and such fees shall become effective on July 1, 2026.

Section 9. Copies of the Budget Ordinance shall be furnished to the mayor, to the Board of Commissioners and to the Clerk of the Town to be kept on file for their direction in the disbursement of funds.

ADOPTED AND APPROVED THIS, THE _____ DAY OF JUNE, 2026

_____
TIM HELMS
MAYOR

ATTEST:

_____
ANGIE MURPHY
TOWN CLERK

TOWN OF MONTREAT
FISCAL YEAR 2025-2026
BUDGET AMENDMENT #15

Be it ordained by the Town of Montreat Board of Commissioners that the following amendment be made to the Budget Ordinance for the fiscal year ending June 30, 2026.

Department(s): **General Fund – Public Buildings**

Purpose:

- To include in the Public Buildings – General Fund budget – Landscaping donations ($6,307).

Section 1. To amend the General Fund/Fund 10 as follows:

Line Item	Account Number	Amount Decrease	Amount Increase	Amended Budget
Add to Budget: Contributions	10-3300-300		$6307	$9807
M & R Buildings &Grounds	10-5000-150		$6307	$9807
GJ Entry: Other Receivables	10-1525-030	Debit $6307		
Contributions	10-3300-300		Credit $6307	

Notes:

Section 2. I certify that the accounting records provide for this budget amendment, and that the ~~revenue~~ source(s) are available:

Rachel H. Eddings — Finance Officer

5/21/26 — Date

Section 3. Copies of this amendment shall be delivered to the Budget/Finance Officer and Town Auditor for their direction.

Adopted this _____ day of _____, _____.

Recorded and filed:

_____ Budget Officer/Town Manager

_____ Date

_____ Town Clerk

_____ Date

TOWN OF MONTREAT
FISCAL YEAR 2025-2026
BUDGET AMENDMENT #16

Be it ordained by the Town of Montreat Board of Commissioners that the following amendment be made to the Budget Ordinance for the fiscal year ending June 30, 2026.

Department(s): **Fund 40 – Stone Bridges**

Purpose:

- To create a budget for Fund 40 – Stone Bridges and include all donated funds as of 5.21.26 ($102,250)

Section 1. To amend the Fund 40- Stone Bridges as follows:

Line Item	Account Number	Amount Decrease	Amount Increase	Amended Budget
Add to Budget: Donations/Contributions	40-3300-300		$92,250	$92,250
Donation/Contrib. – Landscaping	40-3300-341		$10,000	$10,000
Contract Services	40-5000-450		$92,250	$92,250
M&R Grounds – Landscaping	40-5000-150		$10,000	$10,000

Notes:

Section 2. I certify that the accounting records provide for this budget amendment, and that the revenue source(s) are available:

Rachel S. Edney — 5/21/26

Finance Officer — Date

Section 3. Copies of this amendment shall be delivered to the Budget/Finance Officer and Town Auditor for their direction.

Adopted this _____ day of _____, _____.

Recorded and filed:

_____ _____

Budget Officer/Town Manager — Date

_____ _____

Town Clerk — Date

TOWN OF MONTREAT
FISCAL YEAR 2025-2026
BUDGET AMENDMENT #17

Be it ordained by the Town of Montreat Board of Commissioners that the following amendment be made to the Budget Ordinance for the fiscal year ending June 30, 2026.

Department(s): **Governing Body, Sanitation, Administration, Police, Public Works, and Planning and Zoning**

Purpose:

- To move funds from Governing Body to Sanitation to cover shortages in contracted dumpster service. Transfer available funds from Governing Body, Police, Public Works, and Planning and Zoning to Administration to pay outstanding attorney fees.

Section 1. To amend the departments as follows:

Line Item	Account Number	Amount Decrease	Amount Increase	Amended Budget
Professional Services	10-4100-040	$7,732.75		$31,532.25
Contract – Dumpster Service	10-5800-451		$7,732.75	$73,582.75
Dues & Subscriptions	10-4100-530	$4,191.44		$2,596
Professional Services	10-4200-040		$4,191.44	$58,191.44
Dues & Subscriptions	10-5100-530	$11,617.25		$20,785.46
Professional Services	10-4200-040		$11,617.25	$69,808.69
Dues & Subscriptions	10-5550-530	**$5,431.25**		$115
Professional Services	10-4200-040		$5,431.25	$75,239.94
Office Expense	10-5400-320	**$3,931.25**		$659.97
Professional Services	10-4200-040		$3,931.25	$79,171.19

Notes:

Section 2. I certify that the accounting records provide for this budget amendment, and that the revenue source(s) are available:

Rachel K. Eddy — Finance Officer

6/5/26 — Date

Section 3. Copies of this amendment shall be delivered to the Budget/Finance Officer and Town Auditor for their direction.

Adopted this _____ day of _____, _____.

Recorded and filed:

_____ Budget Officer/Town Manager

_____ Date

_____ Town Clerk

_____ Date